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**Washington State Department of Revenue**

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## **BLS System Replacement Study**

### **High-Level Requirements**

**December 21, 2012**

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**Revenue Solutions, Inc.**

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### Version Control

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# 1 Purpose

The purpose of the future vision is to establish the strategic direction upon which alternatives analysis and the implementation approach will be based. The High-Level Requirements Deliverable is an integral part of a clear articulation of the future vision. This document should effectively present Business Licensing Service System (BLS) issues and opportunities, articulate the scope and vision for the future BLS, and define functional and technical high-level requirements.

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## 2 Document Organization

This document is divided into the following sections:

- Section 1: Purpose – This section describes the purpose and scope of the deliverable and its context within the study.
- Section 2: Document Organization - This section describes the content and organization of the document.
- Section 3: Overview – This section provides an overview of the findings and high-level requirement recommendations.
- Section 4: System and Process Improvement Opportunities – This section presents and prioritizes both system and process improvement opportunities.
- Section 5: BLS Replacement Scope – This section defines the scope of the system replacement based upon improvement opportunities and industry leading practices.
- Section 6: Conceptual Architecture – This section presents a high-level summary of application functionality and technology capabilities.
- Section 7: High-Level Requirements – This section provides the recommended high-level requirements for the system replacement.
- Appendix A: Requirements Traceability Matrix – This appendix presents a link to a Requirements Traceability Matrix template, prepopulated with the high-level requirements identified in Section 7.

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### 3 Overview

For more than 24 years, the Business Licensing Service (BLS) System has provided a central location for businesses to register with several Washington State agencies and many cities. Nearly 500,000 businesses are registered or renew through the system annually, and approximately 75% of those transactions are initiated through an online public interface into the system. Just in the last three years, BLS has expanded support to cities' licensing programs from 33 to 55 cities, and more cities are lining up to join. Although in a constant state of enhancement and process improvement, the essential IBM mainframe technology platform has been relatively stagnant while the demand for this service and increased functionality has grown significantly. The Current State Assessment made the argument for change, and this High-Level Requirements document envisions the future BLS and the scope and requirements to realize that vision.

The Business Licensing Service program was created to simplify the business licensing process for the business community, to eliminate duplicate licensing services within regulatory agencies, and to improve the efficiency and effectiveness of state agency and local government business and regulatory licensing. The Current State demonstrated that, for the most part, BLS has met these objectives. The future BLS will bring the support for these licensing and regulatory programs into the 21<sup>st</sup> Century. Additionally, the new BLS will be scalable and flexible to attract and support new state and city license types, simplifying the process for businesses even more. The future BLS will have a direct benefit to businesses, partners, DOR, and Washington State overall. It will be a:

- Business friendly portal to guide businesses through the process, capturing required data, presenting a current status, enabling multiple methods of payment, and providing a single licensing document combining the various licenses (endorsements) administered through the system;
- Centralized system to capture business and partner-specific data, collect and distribute payments, and initiate renewals and license compliance; and
- Modern system built on a technical platform and framework supporting business and partner needs – enabling new partners to join with new functionality with minimal technical impact.

#### ***Business Licensing Service System of the Future***

The BLS system of the future is more convenient and streamlined for businesses, partners and the BLS program staff. While the current BLS process has made starting a business in the State of Washington better, the future system is designed to simplify the licensing process even further.

The BLS will provide a web-based, one-stop licensing service. It is more than an online application form; it is a website where businesses manage their licenses throughout the life of the business. They are able to enter updates and submit partner-requested information. They can view their license status, and make payments for fees and renewals. It is flexible, interactive, and easy to navigate, and provides timely and accurate information and instructions. It provides complete information for businesses and provides partners a system that is easy to use and allows them to focus on their key services and missions. Partners see an increase in compliance and spend less time processing applications.

#### ***The Business Owner's Experience***

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Businesses desiring to do business in the state of Washington enter the BLS site and are provided with information on what steps they need to take to meet all of their licensing requirements. Tutorials provide them with a glimpse of the processes, and FAQs answer questions they may have about the steps they are about to undertake. They are then fully prepared to begin the process of registering when they choose. For cities and agencies not participating in BLS, links are provided for additional information as needed.

As owners begin to set up their business and register for their licenses, they create an account. BLS is secure and provides flexibility for businesses and their authorized representatives to manage access. The registration process is a wizard-driven interview, asking detailed questions in an easy-to-follow flow. The interview is designed to gather enough information to ensure the business is complying with all required licenses. Responses dictate the path the business owner follows in the interview process. Links to licenses not supported by the system yet are provided, ensuring easy navigation back and forth between sources as needed. Questions are asked only once, and businesses may review previous sections to modify responses as needed, stop, save and incomplete filing, exit at any time, and return to complete a filing at a later time.

Data is validated during the interview process. For instance, when they enter the business name the system checks to determine if the business is already registered. Addresses, email addresses, and phone numbers are also verified online, and if questionable, the business owner is asked to provide corrected information.

If additional forms or information is required by a partner to complete their licensing approval or registration process, businesses are able to upload appropriate documents. The system is designed to collect all required information at one time, eliminating the need for partners to go back to the business.

During the interview process, the business is provided a view of the registration process steps, showing them where they are in the process. They may navigate back and forth between the different steps as they choose.

At the end of the interview, the business owner is presented with a total of all fees and charges. They are offered secure electronic payment options. One payment is made for all the endorsements. The system processes the payment and disburses the appropriate amounts to the partners' funds.

Once the application is processed, the business owner is able to return to the site to view the status of their license application. Each separate endorsement is shown with its status. If the business owner has questions regarding the status of an endorsement, the online chat feature of the system allows them to communicate directly with knowledgeable BLS call center staff. Though the interview is designed to gather all required information, if there is additional information required by a partner, or if a partner needs clarification, the information request is displayed in a message center. The business owner can return to their application to respond to the request. Businesses are able to securely print out their license with the approved endorsements as they choose. The self-print feature will include some form of fraud prevention process that ensures confidence in the validity of the document.

Businesses manage their business licensing account using the site throughout the business life cycle. As changes occur they update the data on their account. They have one place where they can go to provide updated information to all BLS partners as well as apply for additional licenses as expansion and changes in their business purpose may warrant.

### ***The Partner's Experience***

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BLS partners are confident in the process used to capture license, registration, and permit applications, assured of system security, and are confident to have BLS manage payments and renewals. Partners interact with a secure web-based system to examine applications, manage their licensee accounts (e.g., performing actions that would not impact other partners, such as adding certain restrictions, adding notes, etc.), and provide regulatory approval.

When partners log onto the system they see work lists of items needing action. They are able to approve multiple items in the list at a time, or they can select a specific application for the detail information that is viewable by them, and make the approval determination one at a time. The system provides functionality where they can forward the item by email to others as needed in the regulatory process. If they need clarification or have questions for the business owner, they have a convenient way to send a notice to the business message center. The status of the endorsement will reflect there is an issue or question that needs a response before approval can be completed. Partners can communicate to the business owner for other issues through the message center. They also have access to the history of business documentations and correspondence online.

The system provides a center for the partners to access all outstanding issues, communicate with businesses and access information and data regarding their program's licenses and businesses. Partners have access to easy-to-read reports and are able to create ad hoc reports as needed.

As new partners join, BLS provides a tool to support data cleaning and validation prior to importing a partner's historical license data into the system. Partners work with BLS to configure specific business rules defining which businesses are eligible and what information is necessary for the partner to complete the licensing processes. Overall, the process is routine and supported by a business team with minimal technical involvement.

### ***Taking the Vision to the Next Level***

This vision for BLS was heard at all of the current state and visioning sessions the team conducted, and there is clearly a consensus among the user community of the direction in which BLS must head. The content of this document supports and further defines the strategic vision presented above.

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## 4 System and Process Improvement Opportunities

The development of high-level business requirements depends greatly on the vision of the BLS system replacement. To get this vision and high-level requirements, the project team analyzed previous discussions, surveys, issues, and impacts, and presented the results to subject matter experts. This analysis resulted in the opportunities listed below and is organized as follows:

- Issue # – Number of the issue for tracking purposes
- Priority – Presents the priority of the issue
  1. Mission Critical – Must-have functionality to meet all stakeholder needs
  2. Stakeholder Specific – Needed by no more than two separate partners
  3. Business User Specific – Preferred by businesses for the user interface
- Issue – Describes the issue as discussed in the Future Vision workshops
- Business Impact – Defines the impact on the business community, partners, or DOR
- Opportunity – Presents the opportunity(ies) available to address the issue
- Requirements # – Identifies the high-level requirements related to the specific issue

During the Future Vision meetings, the discussions were structured around the following core architecture components and this same structure is used here to present the issues, impacts, and opportunities:

1. Data/Information: The major business information flows across internal and external boundaries to accomplish activity of value to systems and stakeholders.
2. Application: The solutions designed to support business functions including individual functional areas, modules or components, their interfaces, and their relationships to each other.
3. Business Processes: The business functions, processes, or activities that capture, manipulate, and manage the business information flows that support BLS operations.
4. Presentation: The delivery channels, external and internal facing human and system interfaces, important look and feel characteristics, key visual cues, interaction aids, tools, and controls.
5. Technology: The hardware, software, and middleware underlying and supporting application and information architectures.

### 4.1 Data/Information Issues, Impacts, and Opportunities

Table 4.1: Data/Information Issues, Impacts, and Opportunities

<i>Issue #</i>	<i>Priority</i>	<i>Data/Information Issue</i>	<i>Business Impact</i>	<i>Opportunity</i>	<i>Req. #</i>
<b>D1</b>	Mission Critical	Currently, partners can create, update, read and even delete information within the BLS data set. In addition, partners often receive and maintain a copy of the BLS data which leads to synchronization issues or update BLS license fields through other systems including but not limited to: Business Identity, location, leadership, and contact information.	Data synchronization issues create different “master” data on partners systems, and the business must contact each agency for changes.	The opportunity exists to share BLS data from a central location through a series of access and update services. In other words, BLS could offer Data as a Service (DaaS). In this model it is feasible that partner rules and evaluation criteria, and ancillary data could also be hosted in the BLS solution.	BLP17
<b>D2</b>	Business User Specific	The process and information for making changes such as address changes to an account is not consistent. Changes are not always shared with all the partners and businesses make changes with any of the partners directly, resulting in inconsistent addresses and data.	Businesses are confused as to which partners they need to inform regarding their changes, and frustrated when they discover not all the partners’ data has been updated. It does not feel like a one-stop system to them.	<p>The overall BLS process could be greatly improved by creating consistent process and data for maintenance including updates, changes, and additions.</p> <p>The overall BLS information consistency and accuracy could be improved by a single source for BLS master data and providing access to both partners and businesses.</p>	BLP1, BLP8

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<b>Issue #</b>	<b>Priority</b>	<b>Data/Information Issue</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>D3</b>	Mission Critical	There is no easy way to access and analyze the data in the system. Partners need better access to the data.	Better data access assists partners with compliance. Additionally, partners can use the data to support other parts of their business (e.g., some cities use license and business location data for economic development efforts).	Provide partners, through BLS, business intelligence tools that enable them to analyze business license data and extract it as needed.	BLP13, BLP15
<b>D4</b>	Stakeholder Specific	The system is not flexible for partners to add fields they may need. Cities would like to add conditions to licenses.	Without the flexibility partners need, the system is not as desirable and does not entice new partners to join. Businesses are best served when all potential partners are involved in BLS.	Partners would greatly benefit from configurable process and information association.  Partners would benefit from BLS access that allows for partners' special information to be entered or uploaded to BLS.	BLP4, TR6
<b>D5</b>	Stakeholder Specific	Many partners need the NAICS code but it is not provided with the business license application (BLA) information. (Other additional data is desired too: FEIN, SSN, email address, etc.). The NAICS code is not applied until DOR reviews the registration request.	When the application does not capture all the needed information, partners have to go back to businesses to obtain the information. This can also slow down the approval and delay businesses receiving the completed license.	Partners and businesses would both benefit from the addition of data in BLS, including but not limited to NAICS, FEIN, SSN, email.  Include questions for the business that can help derive the NAICS code.	BLP10, CS9, TR1
<b>D6</b>	Stakeholder Specific	Cities would like to know what businesses have been located at a specific address in the past.	Cities would use this data to assist with regulatory compliance.	Maintain address history for each business and location, and provide the capability to mine the historical data along multiple parameters.	BLP15, TR11

<b>Issue #</b>	<b>Priority</b>	<b>Data/Information Issue</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>D7</b>	Mission Critical	The internet BLA is not as user friendly as it should be. It is difficult to find, does not collect all the needed data (businesses are not able to upload or attach documents) asks for redundant information, and still requires some manual intervention that could be automated.	<p>Because it does not allow businesses to upload or attach additional documents, there are some partner's licenses that cannot be processed on the internet.</p> <p>Businesses spend unreasonable amounts of time applying for licenses and adding new locations.</p>	<p>Improve the branding and style guide for consistency and enhanced web presence.</p> <p>One central licensing portal that uses "wizard" functionality to guide the business through licensing requirements and regulations.</p> <p>Provide a streamlined, non-wizard process for business owners or registered agents that are familiar with the process and would like to expedite one or more applications.</p>	BLP2, BLP4, BLP6, BLP18, TR3
<b>D8</b>	Mission Critical	Often businesses are confused as to what city licenses they need, if any. Cities have different rules, and often businesses will not apply for the correct licenses; sometimes applying for ones they do not need and sometimes not applying for ones they do need.	Businesses may pay more in license fees than they need, or conversely, they may be operating without all their legally required licenses.	<p>Integrate partner licensing requirements into the system, and enable non-technical resources to modify the rules as needed.</p> <p>One central licensing portal that uses "wizard" functionality to guide the business through licensing requirements and regulations.</p>	BLP4, BLP5, BLP6, CS2, CS7, TR7

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<b>Issue #</b>	<b>Priority</b>	<b>Data/Information Issue</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>D9</b>	Stakeholder Specific	Registered agents supply corporate renewal information as attachments. This information is from their systems, and has to be rekeyed or manually captured for BLS.	This requires additional staffing at BLS for data entry of this information which makes the overall system more costly to businesses and the public.	Giving registered agents or other third party entities the capability of uploading content (attachments or documents) and transferring data would reduce manual work for BLS.	BLP9, TR3
<b>D10</b>	Stakeholder Specific	There are no reports to reconcile the credit card charges that are billed quarterly; final charges may differ from what was authorized, and partners do not have the final charge amounts to reconcile with the bills that they receive.	The charges to the partners are not easily verifiable and increase the potential for inaccuracies.	The BLS process and financial accuracy would be greatly improved by a central accounting system that included an automated credit card reconciliation process and reports.	ACC6, TR10
<b>D11</b>	Mission Critical	Data exchange between BLS and the DOR accounting and financial systems includes many manual processes (i.e., business refund data).	This has the potential to decrease the accuracy of the data and businesses may not receive the proper refund amount or it could be directed to the wrong address. This inefficiency also increases the cost of the system to the businesses.	The BLS process and data accuracy would be greatly improved if BLS/DOR data is integrated or synchronized in an automated fashion.	ACC2, ACC3, ACC4
<b>D12</b>	Mission Critical	Accounting and financial data from BLS is maintained offline in Excel spreadsheets (partner charge data).	The inefficiency increases the cost of the system to the businesses.	The BLS process and accuracy would be greatly improved by a central accounting system that included all accounting and financial data in one system. Additional benefit would be realized if online reporting and dashboards were available.	ACC4

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<i>Issue #</i>	<i>Priority</i>	<i>Data/Information Issue</i>	<i>Business Impact</i>	<i>Opportunity</i>	<i>Req. #</i>
<b>D13</b>	Mission Critical	No verification of existing users applying for new licenses or renewing business licenses.	Limits the amount of licensee information that may be presented to online filers due to the existence of confidential, nonpublic data. This reduces the effectiveness and scope of online filings and requires additional work by both businesses and BLS staff.	The BLS process would be greatly improved through a secure, verified logon ("My Account") access. This would streamline and simplify the experience for businesses, greatly increase confidence in data security and the filing process, as well as decrease BLS staff's workload.	ACC2, ACC3, ACC7, BLP1, BLP2, BLP3, BLP5, BLP11, CS1, CS4, CS5, TR1, TR2, TR3

## 4.2 Application Issues, Impacts, and Opportunities

Table 4.2: Application Issues, Impacts, and Opportunities

<b>Issue #</b>	<b>Priority</b>	<b>Application Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>A1</b>	Mission Critical	There is a steep learning curve for BLS staff and there is little instruction or documentation available regarding the many codes and information they must review and input.	Due to the level of manual intervention, the integrity of the data is subject to human error, data may not be delivered to the appropriate partners, and the system is more costly due to the labor intensive processes.	<p>BLS staff onboarding time would be greatly reduced by implementing a streamlined online process for managing BLS; both the level of effort and the duration of training would be reduced.</p> <p>BLS staff training would be greatly simplified by adding additional processing assistance in the system, including drop down boxes that include codes, criteria and other processing options.</p>	BLP4, CS6, CS8, TR7
<b>A2</b>	Stakeholder Specific	Documentation regarding the process/interface that businesses encounter is either nonexistent or not useful, which makes their experience with the licensing process very unclear to partners.	Partners are not able to provide the quality service they would like and at times businesses are passed back-and-forth between partners and BLS staff for answers.	<p>Provide a user friendly interface that is accessible by all users and includes industry-leading help guides and tools.</p> <p>Provide a comprehensive view of the BLA process that helps the business understand where in the process they are at any given time.</p>	CS3, CS4, CS6

<b>Issue #</b>	<b>Priority</b>	<b>Application Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>A3</b>	Mission Critical	The imaging system is cumbersome for the operators and for the BLS users. DOR is maintaining two imaging systems; one for Tax and one for BLS. Finding image documents can be difficult for partners. If they find a document coded incorrectly they are required to send an email to BLS to have it corrected.	Maintaining two imaging systems adds unnecessary costs to the overall system, as does the level of difficulty in processing the documents.	BLS would benefit from migration to one central WA DOR imaging solution (system and process) which would reduce imaging diversity in the department, adding additional imaging support, and improved access, quality, and performance.	BLP9, BLP12, TR8
<b>A4</b>	Mission Critical	Workflow and queues in the core BLS system are primarily supported by the imaging system. As a result, documents must be imaged to initiate work processes; this includes email and other electronic documents that must first be printed and then scanned.	These additional steps required to image and add documents to workflow increase the manual labor which increases costs to the business and public. The additional time also leads to delays in processing the license application.	BLS would greatly benefit from a central workflow management (Business Process Management Suite - BPMS) platform.  A BPMS would allow for central workflow management, business control of routing and workload distribution, and license status tracking (including partners, financial and renewal.)	BLP9, BLP12

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<b>Issue #</b>	<b>Priority</b>	<b>Application Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>A5</b>	Mission Critical	There are many businesses with multiple Unified Business Identifiers (UBIs). The databases for the Tax, Secretary of State (SOS) corporate and LLC filings, and BLS, are not in sync. Users do not always search or identify existing businesses and erroneously assign an additional UBI to an already registered business.	Data integrity is harmed, resulting in significant State and partner time spent resolving the issues and/or working around the problem.  The SOS has a current backlog of over 50,000 duplicate registrations (UBIs) needing to be resolved.	The BLS accuracy and quality would be improved if data cleansing was performed during or prior to the data migration from the existing BLS IBM/ADABAS solution to a new solution.  Real-time processing of applications/registrations would eliminate the time gap that often leads to duplicate registrations.	BLP7, BLP10, CS1
<b>A6</b>	Stakeholder Specific	When the Electronic Funds Transfer System (EFTS) is transmitted twice a week the partners are left with a complicated monthly-reconciliation process. Partners desire flexibility to work within their own financial system reconciliation timeframe.	Partners spend additional time processing and reconciling financial transactions.	The BLS process and accuracy would be greatly improved by a central accounting system that includes scheduled EFTS transmission as well as automated reconciliation and reporting.	ACC4, ACC6, ACC7

### 4.3 Business Process Issues, Impacts, and Opportunities

Table 4.3: Business Process Issues, Impacts, and Opportunities

<i>Issue #</i>	<i>Priority</i>	<i>Business Process Issues</i>	<i>Business Impact</i>	<i>Opportunity</i>	<i>Req. #</i>
<b>B1</b>	Mission Critical	The license lifecycle process breaks apart after a failed renewal as partners take different routes for compliance. If a business does not renew a license, the business license process does not follow a consistent path. For example, compliance, revocation, and termination tasks are inconsistently applied depending on the location of the business and the types of licenses.	Businesses may be operating without the legally required license. Partners may not be receiving all fees due.	Business license processes would benefit from BPMS tools that initiate automated processes based on business events, such as: renewal (or no renewal), termination, expansion.  Business license accuracy would be improved if all business licenses were managed (apply, renew, update) in an integrated solution.	BLP11
<b>B2</b>	Business User Specific	Incomplete information and unpaid license fees delay the process and ultimately the time to license. Partners would like the ability to manage (issue and resolve) request for payment and/or information themselves, but do not have the capability to do so.	Business owners are unable to legally conduct business in a timely manner. They are impacted financially by the delay.	Automated business process around license completion, business reminders, fee management and accounting would improve the overall license process.  Partner access to BLS process and license tracking would increase the accuracy of license status, improved financial management and reduce time to license (all improve the business experience).	BLP5, CS4

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<b>Issue #</b>	<b>Priority</b>	<b>Business Process Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>B3</b>	Mission Critical	Processes are dictated by the limitations of the system and often result in redundant work for both the business owner and BLS users.	License applications are delayed, and businesses are not able to operate, or are delayed in doing so.	<p>A configurable workflow solution would greatly improve process flexibility and reduce manual process steps, and redundancy.</p> <p>Centralized information access would allow access to consistent and accurate real-time data for business owners, partners, and BLS.</p>	BLP8, BLP12, CS4
<b>B4</b>	Stakeholder Specific	There is no current process to capture and provide visibility to the types of questions and/or standard responses from the Call Center.	Opportunities to improve the system by gathering information regarding common problems and issues are lost and customers continue to experience the same problems again and again.	<p>An automated call center support application would offer business associated notes, questions and call history.</p> <p>A central repository of frequently asked questions and standard response would bring consistency and accuracy to call center support.</p>	CS5, CS8
<b>B5</b>	Stakeholder Specific	BLS accounting information is not easily uploaded to partners accounting systems, which requires multiple data entry points and increases opportunities for errors while also making the system less efficient for the partners.	The reconciliation process for partner payments is inefficient.	The BLS process and financial accuracy would be greatly improved by a central accounting system capable of providing real-time financial reports and status to BLS partners.	ACC4

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<b>Issue #</b>	<b>Priority</b>	<b>Business Process Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>B6</b>	Mission Critical	The charge to partners for access (CPU Usage) is minimal but requires a lot of manual data input and tracking – there is no direct upload from BLS to the accounting system.	BLS staff spends more time and money calculating and billing for the CPU usage than the actual cost of the usage.	Migrating BLS applications to a DOR hosted solution will remove the partner charge back process, resources, and complexity.	ACC7
<b>B7</b>	Mission Critical	The accounting process to allocate payments to specific license applications (validation number) is cumbersome and inefficient for users. Payments for taxes do not require the validation number.	The inefficient accounting processing increases the overall cost of the system.	The BLS processing cost and accuracy would be greatly improved by a central accounting system that included automated validation and reconciliation.	ACC4
<b>B8</b>	Stakeholder Specific	The process for partners to submit payment documents they receive in house has limited controls. If a check is delayed or missing the resolution process is labor intensive.	Partners need a system that has all the proper controls in place; which ensures their system is accurate.	A BLS online payment solution that is accessible and available to businesses, partners would create a consistent and efficient way to submit payment documents; proper controls would be in place and payments would be accurately accounted for.	ACC1, ACC5

### 4.4 Presentation Issues, Impacts, and Opportunities

Table 4.4: Presentation Issues, Impacts, and Opportunities

<b>Issue #</b>	<b>Priority</b>	<b>Presentation Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>P1</b>	Stakeholder Specific	The system is not easy to use for partners. Navigation through BLS screens is difficult, the logon process is confusing and lengthy, and information is not presented in a user friendly, logical flow.	It is difficult for partners to provide quick and efficient service to businesses because of the confusing screens. Instead, partners must pass the business on to BLS to resolve the question adding steps and time to resolving the business's question	<p>WA businesses, DOR, and BLS would benefit from improved branding and style guide for consistent and enhanced web presence.</p> <p>Businesses would benefit from an easier to navigate and wizard driven business license internet portal.</p> <p>The BLS process would greatly benefit from improvement in content management, data sharing, online help, and pre-population features from the web interface to BLS.</p>	CS3, CS6, TR1, TR2
<b>P2</b>	Business User Specific	The flow of the internet renewal is not logical. A critical question of whether they have changed structure (entity) is not asked until towards the end of the internet renewal process. This requires that they complete a new BLA.	Businesses are frustrated wasting valuable time going through an online renewal process when they should be completing a new BLA.	Clarity and efficiency required by the business community can be achieved by implementing new and automated workflow solution for BLS that allows process reengineering and continuous process improvement.	BLP6, CS4

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<b>Issue #</b>	<b>Priority</b>	<b>Presentation Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>P3</b>	Stakeholder Specific	Partners do not feel many of the reports they receive are understandable or usable. Requesting a different type or variation of a report is costly, may not be possible, and if possible, can take several weeks to receive.	Opportunities for partners to carry out their mission more efficiently are lost and may result in a more expensive system for businesses and the public.	The BLS solution would benefit by centralized data and configurable reporting features allowing DOR/BLS as well as partners to create, configure, and improve reporting.	BLP13, BLP15, TR10
<b>P4</b>	Business User Specific	The issuance of a completed license with all the required endorsements may take several weeks. Businesses do not have an easy, quick way to obtain proof of registration to be able to open bank accounts or receive loans. When they contact BLS for a copy of a license, staff use a screen capture and save the image into another format before emailing or faxing.	Delays in receiving the license are frustrating to businesses and can cost them money. Having to call BLS staff for a copy of a license is an unnecessary step if they could print them out themselves.  Adds to the work and effort of BLS staff.	BLS process reengineering, workflow routing, automation, and access to the central system will greatly improve time to get approval, tracking of license steps, incremental endorsement as well as final license approval.	BLP3, BLP5, CS4
<b>P5</b>	Mission Critical	A business owner's account balance is not easily determined nor displayed; amounts due are tracked by transaction and location.	Businesses must look through paper correspondence or contact BLS staff to determine the total amount they owe.	The BLS process and financial accuracy would be greatly improved by a central accounting system associated with an application tracking system, providing balance due information, application status, and license endorsements.	ACC4, BLP5, CS4

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<b>Issue #</b>	<b>Priority</b>	<b>Presentation Issues</b>	<b>Business Impact</b>	<b>Opportunity</b>	<b>Req. #</b>
<b>P6</b>	Stakeholder Specific	Financial views of payment transactions, requests for payment, and receipts all require searching in different systems. Multiple systems lack a cohesive view of the license accounting and cash management.	BLS resources are required to manually reconcile among systems.	A centralized data management strategy and solution coupled with data services will allow consistent view of data across multiple web views and between various systems.	ACC4, ACC7, BLP14

### 4.5 Technical Issues, Impacts, and Opportunities

Table 4.5 Technical Issues, Impacts, and Opportunities

<b>Issue #</b>	<b>Priority</b>	<b>Technical Issues</b>	<b>Business Impact</b>	<b>Opportunities</b>	<b>Req. #</b>
<b>T1</b>	Mission Critical	Technical staff having a deep understanding of processes and procedures, but as staff retire that knowledge base is depleted and new staff are difficult to find with the required skill set.	The system is unable to keep up with emerging technologies and businesses are frustrated working with an antiquated system.	As new processes and technology are deployed, documentation can be created or recreated to support forward progress.  DOR can select current technologies and maintain flexibility to evolve with industry standards.	TR5, TR9
<b>T2</b>	Mission Critical	Making enhancements or changes in the system is difficult and may take significant time to complete; IS spends at least three months per year making legislative changes, and even the simplest business change can result in significant code changes.	Unnecessarily complex changes increase the risk of system downtime or inaccurate information.	BLS would greatly benefit from more current technology, industry leading practices, and a central workflow management platform. These would allow configuration changes to support new policy, forms, or legislative changes. Such changes can be made, tested, and deployed in weeks instead of months (even days once development processes are mature).	TR5

<b>Issue #</b>	<b>Priority</b>	<b>Technical Issues</b>	<b>Business Impact</b>	<b>Opportunities</b>	<b>Req. #</b>
<b>T3</b>	Mission Critical	Business rules are hard coded into the system in various places, and development staff does not have sufficient documentation to identify where all changes must be made.	This significantly increases the time to make changes and the risk of errors within the system. Businesses, partners, and DOR are all negatively impacted by this.	Central business rules management would allow for central management, simulation, and configuration changes rather than major software redevelopment or application redundancy. (Central business rules management is a software component that allows staff with limited technical training to add or change business logic.)	TR5, TR7
<b>T4</b>	Mission Critical	Multiple, inconsistent BLS data exchange standards are difficult to maintain and create confusion and errors for partners.	Data can be lost, so changes are not made to all the partners' data and businesses must deal with the incorrect data, i.e., mail being misdirected or having to resupply information already submitted.	A centralized data management strategy and solution coupled with data services will allow standardized access to BLS data across multiple web views, and between various systems.	BLP9
<b>T5</b>	Mission Critical	Adding new partners is a complex and time consuming process.	The complexity adds to the cost of the system and is a deterrent to new partners coming onboard, which makes the system less than desired for the businesses.	BLS would greatly benefit from central workflow management platform that allows configuration changes to support new partners rather than the current complex and time consuming process.	BLP16
<b>T6</b>	Mission Critical	Accounting staff must create and manage complex Excel spreadsheets with built-in macros and other complicated formulas.	This creates an inefficient system and a costly system for Finance and Cash Management to support.	Technically advanced accounting systems exist to support the work Finance and Cash Management staff do. Many of these also offer flexibility for end users to report and reconcile financial transactions.	ACC4, TR7

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<b>Issue #</b>	<b>Priority</b>	<b>Technical Issues</b>	<b>Business Impact</b>	<b>Opportunities</b>	<b>Req. #</b>
<b>T7</b>	Mission Critical	The current system hits limitations with regard to volume processing and dollar amounts (e.g., Dealer plates have a 702 limit for plates, based on plate configuration, and some dollar thresholds exist at \$99,999).	These limitations cause delays in the system and can prevent or delay a business from obtaining necessary licenses.	Modernized platforms provide flexibility and do not have constraints such as those in the current system.	TR6, TR9
<b>T8</b>	Stakeholder Specific	Conversion is a highly manual process with some support provided by the data warehouse.	The time to bring a new partner on board can be lengthy and delays mean a less efficient system for partners and potential delays for license applications.	A data matching tool to support integrating new partner data with existing BLS entities would make the onboarding process much more efficient and timely.	BLP16

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## 5 BLS Replacement Scope

To further assist in defining the high-level requirements, the RSI project team met with the Systems Transformation and Refresh (STAR) Steering Committee to clarify the scope of the new BLS. The Steering Committee was presented with the following scope functionality and agreed upon whether each was to be included in the final system scope. The lists below provide the Steering Committee’s direction and comments.

### *Within Scope*

- The solution should support integrated workflow, but the implementation plan should include only BLS-internal workflow and the current queues for L&I Employment Standards, no additional ones for partners.
- BLS is the system of record for all partner endorsements.
- BLS maintains the current status of city partner endorsements through the city process (e.g., “Under Planning Review.”). BLS will further define the status of city endorsements, and will enable city partners to select from more status options.
- Renewals are initiated and payments are processed by BLS. Licenses managed through BLS will continue to have the renewal process initiated by BLS. With paper renewals, the payments will continue to be processed under the current lock box process.
- SOS renewals and associated payments are managed by BLS (currently a hybrid approach in that SOS is not a partner in the application process). Any additional services requested by SOS will be considered out of scope for this study.
- BLS should continue to be flexible enough to maintain existing agency data (e.g., x-ray tube inventory).
- Agencies and field offices are allowed to process applications.
- Partner “license required” rules are integrated into an online wizard for businesses. Requirement and eligibility rules will be incorporated to determine whether a business is required to have a license. Regulatory rules determining whether a business meets the qualifications will not be included.
- Non-BLA documents are imaged and stored within BLS. (e.g., Limousine insurance documentation is currently imaged and stored.)
- BLS manages all document intakes whether or not documents are imaged. (e.g., Private Investigator background checks are received at BLS, but Licensing wants the paper copies not imaged.) Continue under current functionality and be flexible to add new document types.
- All partner addresses maintained in BLS as official record (Currently depends on the partner and their willingness to update BLS). Maintain ability to do so; use current state as standard.
- Include existing partner application/endorsement rules in BLS. (Only a few cities and agencies currently have rules in BLS.)
- Maintain existing partner data that is critical to licensing (e.g., fee based information). System should be flexible to add, but implementation will not include any new data types.
- Provide compliance support within BLS to include renewal reminder letters.
- Provide compliance support within BLS to include license cancellations.

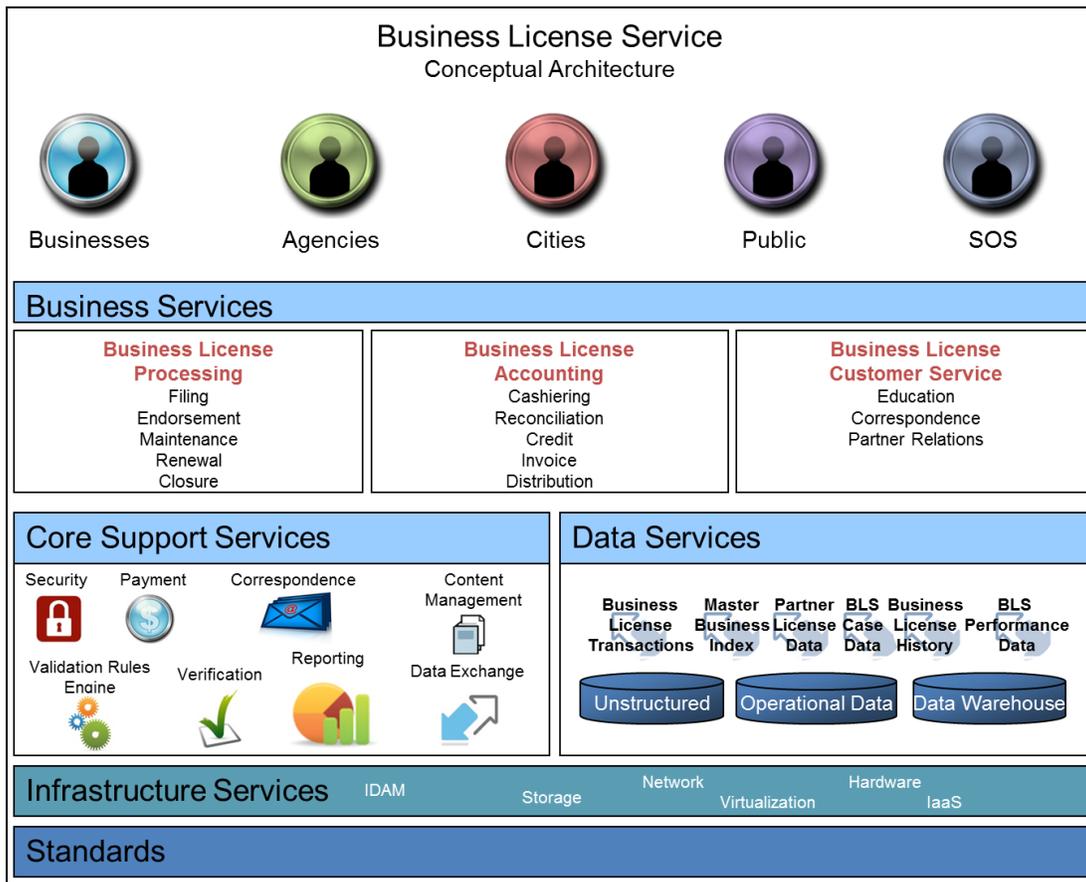
## 6 Conceptual Architecture

Issue and opportunity recognition help develop a vision for BLS with regard to the functionality and technical tools needed to provide top-rate service to businesses and partners. While the vision sets the strategic target for BLS, the Conceptual Architecture provides the first step toward realizing the vision through a strategic structure and defined capabilities.

This section presents a summary of capabilities through the use of the Conceptual Architecture below. It is a service-oriented multi-layer architecture aligned with industry best practices in reuse and is suitable for Service Oriented Architecture (SOA) deployments. The graphic below illustrates the following architectural sections:

- Stakeholder Access
- Business Services
- Core Support Services
- Data Services
- Infrastructure Services

Figure 6.1: Conceptual Architecture



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## 6.1 Stakeholder Access

The stakeholder access layer is the mechanism through which stakeholders have access to BLS information and activities. Most often, this will be through a web-based portal or direct interfaces for exchanging data. Stakeholders will access BLS for various reasons:

- Businesses: Apply, check status, renew, update information, print licenses
- Agency and City Partners: Approve licenses and certifications, access and update licensee data, and access revenue distribution
- Public: Business look-up and license inquiry
- SOS: Newly registered entities, entity renewals, and entity information exchange

## 6.2 Business Services

The business services layer serves as the coordination layer where the various services implemented for the BLS program are managed. Staff with minimal technical skills or training should be able to configure the business rules for these systems, manage them, and tune their performance based upon process needs.

The core business services within BLS are:

- Business License Processing: The complete license lifecycle support from the time the business first applies for a license through partner approvals, subsequent maintenance of information, initiation of renewals, and business closure or license revocation.
- Business License Accounting: The collection, processing, reconciliation, and distribution of all license fees and payments.
- Business License Customer Service: The guidance and assistance provided, through the BLS system or by staff, to assist businesses in accessing licensing requirements, achieving license compliance and to support partners.

To support these services, BLS should use business process management technologies for end-to-end business processes lifecycle management by defining process, tools and technologies for modeling, developing, deploying, managing and governing the business processes. The BLS business services layer should be implemented using a set of open standards such as:

- Business Process Engine: Provides the development and run-time environment for business processes simulation, testing, and deployment, as well as run-time configuration.
- Business Activity Monitoring (BAM): Monitors the metrics for the business processes, can be used by the business services layer for aggregation, analysis and presentation of information associated with BLS business events. Business processes can be tracked by their relationship to the key performance indicators for the BLS business. This allows BLS business managers and executives to gain visibility to the real-time performance of the business services and make context-based decisions and to optimize the business processes to improve speed and effectiveness of business operations. The historical data captured by BAM can be analyzed to

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present how well the business process and service trends are adhering to various policies and fulfilling partner service level agreements.

- Business Rules Engine: Used to externalize various business rules from the business process implementation.

### **6.3 Core Support Services**

The core support services layer includes various business, technical, data, decision, and security services. These components should be implemented using best practice technology, refined for license processing and could be exposed as Web Services Interoperability (WS-I) based on service contract specifications.

The following are the high-level service categories that could be implemented in the core support services layer:

- Security Services: Supports access to services based on role and leverages the identity and access management infrastructure. Supports applicant/license user identity verification and secure access to the licensee's account(s).
- Payment Services: Provides for the receipt, accounting and distribution of license related payments.
- Correspondence Services: Provides configurable, scheduled, and tracked correspondence features.
- Content Management Services: Provides content search, associate and routing functionality.
- Validation Rules Engine: Provides externalized business rules repository including, but not limited to, application rules, agency rules, or city rules.
- Verification: Provides data verification, purification, and quality services.
- Reporting: Provides online reporting capabilities that can be provided as a service to internal and external customers.
- Data Exchange Services: Provides access to the persistent data for the BLS system and partners; Extract-Transform-Load (ETL) mechanisms to process and enrich data in bulk transaction processing. (Note that this is not recommending continuation of bulk updates to data that can occur online in real time.)

### **6.4 Data Services**

The data services layer is where all data and information is stored and information management systems access it. The data may include both structured and unstructured data in diversified formats such as:

- Operational Data: Used to support operational activities within BLS.
- Data Warehouse: Structured (redundant or additional) to support custom data extracts and statistical and performance reporting and analysis.
- Unstructured or Content: Supporting documents and files (e.g., images and spreadsheets).

The following is a partial list of data services that may be a part of the BLS Data Services Layer:

- BLS License Transaction: Service manages, retrieves and updates transaction information

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associated with applications and renewals.

- BLS Master Business Index: Identifies all businesses that have applied for a license and have created a user account or saved information (e.g., partially completed application).
- Partner License Data: Manages, stores and retrieves various data sets that are “partner specific;”
- BLS Case Data: Manages access to case work, past and present.
- BLS License History: Allows the service consumer to access history on a specific business including license, location and status.
- BLS Performance Data: Tracks key statistical information to improve both the service and processing associated with business licenses.

## **6.5 Infrastructure Services**

The infrastructure layer focuses on the orchestration and virtualization of infrastructure components. The infrastructure layer should ensure resources are available dynamically as required to maximize flexibility. The key characteristics of BLS infrastructure layer should be:

- Infrastructure as a Service (IaaS)
- Storage Orchestration
- Identity and Access Management
- Hardware, Network
- Infrastructure and Operating System Virtualization

## 7 High-Level Requirements

The functional description, issues and opportunities, and conceptual architecture all lead to the high-level requirements against which alternatives will be evaluated. The table below presents these requirements grouped by the core BLS capabilities presented in the previous section.

Table 7.1: High-Level Requirements

<i>Req. #</i>	<i>Description</i>
<b>Accounting</b>	
<b>ACC1</b>	The solution shall integrate with multiple BLS components to provide, and leverage a common payment system that supports e-check, credit card, cash and paper check.
<b>ACC2</b>	The solution shall provide online payment capability that interfaces and integrates with DOR/BLS business and financial applications and with AFRS.
<b>ACC3</b>	The solution shall comply with state statute, policy, and accounting standards and requirements (allows segregation of duties e.g., controls who can process refunds and who has supervisory level approvals).
<b>ACC4</b>	The solution shall include or leverage a central accounting solution that includes fee calculation, reconciliation, collection and receipt of payment, and accounting rules that are configurable and utilize standard double-entry accounting.
<b>ACC5</b>	The solution shall provide transparency of financial transactions and the ability to identify and trace payments from transactions through distribution of revenue.
<b>ACC6</b>	The solution shall provide the ability to automatically account for and allocate credit card fees for charge back to BLS partners.
<b>ACC7</b>	The solution shall provide a method for partners to access BLS information (financial and licensing transactions) and to provide a fully automated, seamless, process for partners' to download the data to meet their accounting and licensing needs (no manual intervention).
<b>Business License Processing</b>	
<b>BLP1</b>	Businesses, registered agents, partners, and BLS staff shall be able to create/modify/update an entity account with the appropriate permissions.(see TR1 for role-based security requirement)
<b>BLP2</b>	Businesses, registered agents, authorized representatives, partners, and BLS staff shall be able to complete a business license application or renewal with the appropriate authority.
<b>BLP3</b>	The solution shall create business licenses to be available online or printed; the business license can be displayed as a list of various license endorsements or as a stand-alone certificate as needed.
<b>BLP4</b>	The solution shall include an online license application wizard which provides clear and accurate information prior to starting the application, identifies license requirements, provides guidance if the license is not supported by BLS, and presents information from partners.

<b>Req. #</b>	<b>Description</b>
<b>BLP5</b>	The solution shall provide a comprehensive account view with a display of business license information including but not limited to: real-time view of life cycle events, a progress guide, fee calculator, and application tracking and payment status. This view should be tailored to the appropriate role of the user.
<b>BLP6</b>	The solution shall adhere to user interface best practices for navigation (e.g., data accessible with minimal number of clicks, allows users to go back and forward, provides consistent navigation, allows saving upon exiting, etc.)
<b>BLP7</b>	The solution shall create and assign/associate the state standard Unified Business Identifier (UBI).
<b>BLP8</b>	The solution shall provide automated workflow to route application data with partners.
<b>BLP9</b>	The solution shall provide or leverage an enterprise content management solution, including but not limited to: document management, upload/submit/attach electronic attachments, document retention and archiving capabilities.
<b>BLP10</b>	The solution shall provide data validation and verification, which presents possible duplicate businesses to the user with the associated third-party data. (Example: CASS Certified Postal standardization; validation of e-mail address; NAICS, GIS.)
<b>BLP11</b>	The solution shall provide renewal and update functionality for businesses and partners; including email alerts to businesses, pre-populating account data and allowing businesses to confirm or change data at renewal.
<b>BLP12</b>	The solution shall provide workflow functionality with self-managed reassignment to staff/queues and automatic routing based on business rules that provide work items to users and can route web and non-web documents.
<b>BLP13</b>	The solution shall provide transaction audit trail, integrated reporting functionality, online customer service transaction research capability and easy creation of ad-hoc reports by partners.
<b>BLP14</b>	The solution shall be able to waive penalties upon request by BLS staff with appropriate authority.
<b>BLP15</b>	The solution shall provide Business Intelligence functionality that allows BLS, accounting, and partners to view standard reports and to “drill down” into data as they need; data should be available in industry-standard formats for download for internal BLS, accounting, and partner analysis.
<b>BLP16</b>	The solution shall be able to utilize data from other sources (e.g., tax data) to validate and cleanse new partners’ data during conversion (e.g., closed locations).
<b>BLP17</b>	BLS is the Master data file for business entity information. Data originates at BLS and partners are informed of updates.
<b>BLP17</b>	Provide a streamlined, non-wizard process for business owners or registered agents that are familiar with the process and would like to expedite one or more applications.
<b>Customer Service</b>	

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<i>Req. #</i>	<i>Description</i>
<b>CS1</b>	The solution shall have the ability to “push” information to the business and partners in the form of alerts to required actions.
<b>CS2</b>	For partner-specific rules and regulations, the solution shall provide users with a link to the appropriate partner website and/or contact information.
<b>CS3</b>	The solution shall guide and direct new businesses (utilizing wizard functionalities) to identify the requirements for establishing their reporting and filing requirements for the state and local governments; determining their registration or authorization needs; payment needs and any other statutory demands.
<b>CS4</b>	The solution shall provide a comprehensive view of business license information including an overview of registration(s), licensing profile, application tracking and filing status.
<b>CS5</b>	The solution shall provide secure/encrypted communications between partners and businesses.
<b>CS6</b>	The solution shall provide educational information including but not limited to: online tutorials, FAQs, links for continued interaction with partners, help and error explanations that can be managed by partners.
<b>CS7</b>	The solution provides convenient access to business and industry-related information and downloadable/printable forms from non-participating agencies or partners, based on their input.
<b>CS8</b>	The solution provides an automated and searchable Call Center knowledge base which creates a record of customer questions, Call Center responses and categorizes the question/response. This should be viewable by BLS staff and to businesses when appropriate.
<b>CS9</b>	Partners will have configurable data elements to support capture and processing of data specific to the partners’ regulatory needs.
<b>Technical</b>	
<b>TR1</b>	The solution shall provide role-based security that complies with state security standards.
<b>TR2</b>	The solution shall provide single sign-on functionality for businesses and partners.
<b>TR3</b>	The solution shall provide the ability to delegate authority to representatives.
<b>TR4</b>	The solution shall provide electronic signature capability.
<b>TR5</b>	The solution shall provide tiered back-up strategies for BCP/Disaster Recovery based on criticality of content.
<b>TR6</b>	The solution shall be extensible and scalable to support onboard of additional partners.
<b>TR7</b>	The solution shall provide business rule management (creation, modification, or deletion) that is configurable by staff with minimal technical knowledge or training.
<b>TR8</b>	The solution shall leverage or provide a single standard imaging and document management system that is extensible for other DOR needs.
<b>TR9</b>	The solution shall operate on a WA DOR preferred platform (See Enterprise Technical Architecture Standards).

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<i>Req. #</i>	<i>Description</i>
<b>TR10</b>	The solution shall provide ad hoc reporting and standardized reports, data, etc. to partners as needed.
<b>TR11</b>	The solution shall leverage existing DOR GIS capability.

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## Appendix A – Requirements Traceability Matrix

The attached file contains a template for the Requirement Traceability Matrix. This template is provided as a tool that can be used in the next phase of the BLS Replacement, specifically when developing detailed requirements.



Microsoft Excel  
97-2003 Worksheet