

Local Government - Validate Data

in list [Product Backlog](#)

LABELS

[Local Government](#)

Description [Edit](#)

As a Local Government user, I want to validate that the GIS is populated with the correct jurisdiction/location codes for all of my county addresses.

Acceptance Criteria [Delete](#)

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- "County" is specifically mentioned - is the story also applicable to towns, cities, metropolitan districts, school districts, et al? Is there an implicit requirement that those jurisdictions are also defined, since a given county may have multiple towns (and vice versa?) Should the persona be changed to 'Jurisdiction official' or something along those lines?
- Is this a special user story for the map? Or is there a need for some printout/file transfer of "all of my county addresses"? If that is the need, is that a variation on the RPU Bulk Data user story?
- Input(s): Jurisdiction/location code, address or location list
- Output(s): For each address, the tax jurisdictions for it. A given address may have multiple tax jurisdictions.

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Implementation (task breakdown for developers) [Delete](#)

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Tests (for automated or unit tests) [Delete](#)

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- Test 1

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☒ Product Backlog / User Story Directions and Template Card

in list [Product Backlog](#).

☰ Description Edit

Product Backlog (User Stories):

As a <type of user>, I want to <do something>, so that <some value is created>.

- Which users the story will benefit (who it is for)
- A brief description of the desired functionality (what needs to be built)
- The reason the this story is valuable (why we should do it)
- An estimate as to how much work the story requires to implement
- Acceptance criteria that will help us know when it has been implemented correctly

☒ Acceptance Criteria

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Requirements list created from user story.

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Test 1

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☒ Deployment Tasks

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Deployment task 1

US (User Story)#1 Anonymous Public User - Single Address Search

in list [Product Backlog](#) 

LABELS

[General Public User](#)

Description [Edit](#)

As a user, I want to search the GIS master table by a single Colorado address and date, so that I can retrieve the accurate sales tax rate for that location and date.

Acceptance Criteria [Delete](#)

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- From Project Charter: "Provide free, web-based (interface optimized for desktop and other devices such as mobile and tablet)"
- INPUT Address type, Street Address, Postal Address, Lat/Longitude, Coordinates, Point & Click Maps, Street intersections, UTMC.
- Search criteria must include location and date. Search is for a single date. Default date is Today, prepopulated.
- Support map selection as input, i.e. point and click on a map as the input. Granularity/zoom has to be sufficient to resolve to a discrete, identifiable location
- Addresses entered using text that are near-matches for an address on file (e.g. missing street direction, 5 vs 9 digit zip codes...) will be prompted to verify or select the address on file. Error messages for addresses that cannot be resolved.
- Error messages for invalid/unresolvable location or date. Error message for date outside of acceptable range. Limit date entries to Today - X years (need to define 'X')
- OUTPUTS: 1) Echo/Confirm address and date that was input (What to do for map selection? Default date is Today) 2) Jurisdictions for the location. For each jurisdiction: 2.1) Jurisdiction name and code 2.2) Default tax rate 2.3) Additional/alternative tax rates (if any) (e.g. liquor, rentals, cigarettes,) 2.4) Exemptions (lower priority than other data) 3) Total tax rate % 3.1) Total tax rate uses default rate(s) only, no additional/alternative rates 4) Rates are shown as numeric % 5) Date/timestamp of output 6) Disclaimer verbiage (assuming it is needed) CLARIFICATION: We can't show a \$ amount unless we support an input of a \$ amount. QUESTION: Are the names self-evident, or do we need a 'jurisdiction type' field (school district, county, metropolitan, ...)?
- Can be accessed through [Colorado.gov](#) by the general public

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 Deployment task 1[Add an item](#) **Activity**[Show Details](#)

DJ **Dharmendra Jha - OIT** yesterday at 6:17 PM (edited)

DOR-OIT GIS Stakeholders meeting

Date: 10/01

Venue: CDOR Gaming commission Facility in Golden, 17301 W Colfax Ave, Golden CO 80401

- GIS capabilities and demo discussed
External users gave their feedback on various types of address inputs including the complicated ones like coordinates, latitude longitude, parcels no.
- Discussion on Location code as output
- Jurisdiction code is the same as the location code
- Lat & Longitude address inclusions
- Parcels address input inclusions
- Details Tax rates out inclusions
- Total Tax inclusions
- Licensing requirements inclusion
- Point and click Maps inclusions
- Small business talk about capabilities on their POS
- POS capabilities can be done through third-party vendors.
- API capabilities for big business inclusions
- Small Business can upload excel as an option for Bulk Search
- Built a portal (per Lu) for self-service
- Lu suggested a single portal for tax data input and where will funds can go (for Local government)
- Sales Tax rates changes happen from Jan 1 to June 30th (need to confirm the time period again with SMEs)
- Different Jurisdiction should have a copy of their own Data
- Issues with address with two different jurisdictions claiming them (Challenges)
- The arbitration will happen for the above point by the steering committee.
- A representative has a draft bill, municipalities submit data should have a 95% validation rate per bill.
- Remittance reports for local government (Outside GIS).
- Dispute process for overlapping addresses

☺* - [Reply](#)

R **rick.maiden** yesterday at 3:10 PM (edited)

Notes from Stakeholder meeting

- Location code as output
- Jurisdiction code is same
- Lat & Longitude address
- Parcels address
- Details Tax rates
- Total Tax
- Licensing requirements
- Point and click Maps

😊 - [Edit](#) - [Delete](#)

US#2 RPU - Single Address Search

in list [Product Backlog](#)

LABELS

[Registered Public User](#)

Description [Edit](#)

As a registered public user, I want to search the GIS master table by a single Colorado address and transaction date, so that I can retrieve the accurate sales tax rate for that location and date.

Acceptance Criteria [Delete](#)

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- Registered public user sign-in credentials and authentication.
- Error if wrong credentials
- Inputs and Outputs for RPU are the same as US #1.
- Security considerations, e.g. password aging, retry limits?

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US#3 RPU - Map Jurisdiction

in list [Product Backlog](#)

LABELS

Registered Public User

Description [Edit](#)

As a Registered Public User, I want to view jurisdiction boundaries for a specific date on an interactive map so that I can determine the correct jurisdiction/sales tax rate.

Acceptance Criteria [Delete](#)

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- Input includes a date, default is Today. Other possible inputs - address, jurisdiction/location code, cross streets, etc.? Same inputs as US#1. Acceptable dates are Today - X years (X to be defined)
- Output: Map, with jurisdiction boundaries displayed.
- Map is initially displayed at the default (system default, not per user) scale. (if the vendor supports user-level personalization or preferences for this, great!)
- User can filter for a single jurisdiction, and the map will display only the requested jurisdiction. Might need a selector list comprised of all jurisdictions for the selected location?
- User can zoom and navigate/change focus of map
- Map displays all jurisdictions as overlaid shapes (shading, color, etc) Usability, UI/UX, vendor capabilities for this?

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US#4 RPU - Bulk Search

in list [Product Backlog](#) 

LABELS

[Registered Public User](#)

Description [Edit](#)

As a Registered Public User, I want to upload a file with multiple addresses and dates (up to NN thousand) and receive a response with tax rates for each address and date so that I can accurately report sales tax without doing individual searches.

Acceptance Criteria [Delete](#)

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- Multiple dates - Can they vary by address/jurisdiction combination, or is it one set of dates for the query?
- Input file format is .csv only, with a defined template of objects and fields.
- OUTPUTS: 1) Echo/Confirm address and date that was input (What to do for map selection? Default date is Today) 2) Jurisdictions for the location. For each jurisdiction: 2.1) Jurisdiction name and code 2.2) Default tax rate 2.3) Additional/alternative tax rates (if any) (e.g. liquor, rentals, cigarettes,) 2.4) Exemptions (lower priority than other data) 3) Total tax rate % 3.1) Total tax rate uses default rate(s) only, no additional/alternative rates 4) Rates are shown as numeric % 5) Date/timestamp of output 6) Disclaimer verbiage (assuming it is needed)
- Output format is .csv
- Query limits, throttling? Limited timespan, quantify "NN thousand"
- Progress indicator for the upload and subsequent download.

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US#5 RPU - Register for Account

in list [Product Backlog](#)

LABELS

[Registered Public User](#)

Description [Edit](#)

As a public user, I want to register for an account so that I can use the full range of available public features to do my job.

Acceptance Criteria [Delete](#)

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- Information required for registration? Is there any validation or verification of the user or information?
Login ID and password. Account maintenance (change password, change email address...)

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Implementation (task breakdown for developers) [Delete](#)

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US#6 RPU - Update Account

in list [Product Backlog](#)

LABELS

[Registered Public User](#)

Description [Edit](#)

As a Registered Public User, I want the ability to update my account information (email address, etc.) so that the system has current information about me.

Acceptance Criteria [Delete](#)

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- Is there only one version/type/profile for RPUs? No distinction between commercial and individual citizen, no variations in permission or features?

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US#7 RPU - Report Error

in list [Product Backlog](#)

LABELS

[Registered Public User](#)

Description [Edit](#)

As a Registered Public User, I want a simple form to report data and system errors so that the system administrators are aware of them.

Acceptance Criteria [Delete](#)

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- Who does the error report go to? Do we need to classify errors reports - data (e.g. this address is not in the reported jurisdiction), system/UI (timeouts, incomplete data returned), other?
- Feedback process/mechanism to update the user who reports an error - email? Update on receipt of message, clarification, resolution?
- Ability to attach a document or screenshot?
- Any alternative for reporting the error, e.g. call the contact center?
- Should there be a comparable capability for anonymous public users?

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- Test 1

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US#8 Public Developer - Register for Account

in list [Product Backlog](#)

LABELS

Public Developer

Description [Edit](#)

As a public user, I want to register for an account so that I can use the full range of available public developer features to do my job.

Acceptance Criteria [Delete](#)

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- Information required for registration? Name, contact info, anything more? Is there any validation or verification of the user or information?
- Does the API require an identifier (unique?) for each developer? If yes, are those identifiers/keys delivered to the developer via email, and authenticated with each API session?
- Value-add features that differentiate between registered public and registered developer users? API access... anything else?
- Support for Public Developers, is it needed? Tech answers, forum, Q&A?

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US#8.1 Public Developer - API Endpoint for Bulk Search

in list [Product Backlog](#)

LABELS

[Public Developer](#)

Description [Edit](#)

As a public developer, I want to access an API endpoint that will perform searches by multiple addresses and tax periods so I can integrate it with my software application.

Acceptance Criteria [Delete](#)

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Any requirements/certs for someone to register as a Public Developer? Any guardrails in the API to limit searches, resource use, etc?

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Deployment task 1

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US#9 Public Developer - Download complete data set

in list [Product Backlog](#)

LABELS

Public Developer

Description [Edit](#)

As a Public Developer, I want to download the complete Colorado Sales Tax GIS dataset, so that I can use the data in my software application.

Acceptance Criteria [Delete](#)

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- Any need to throttle this, or schedule for overnight runs to avoid system performance drag?
- Output and input format(s)? .csv?
- Define "dataset" - which objects, fields, etc. For each location, all applicable jurisdictions, rates, alternative rates, and exemptions.

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US#10 Public Developer - API Endpoint for Single Search

in list [Product Backlog](#)

LABELS

[Public Developer](#)

Description [Edit](#)

As a Public Developer, I want to access an API endpoint to perform a single record search by address and date so that I can integrate it with my software application.

Acceptance Criteria [Delete](#)

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- Same parameters as US #1 (?)
- Same outputs as US #1 (?)

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- Deployment task 1

US#11 Local Government - Change Boundaries

in list [Product Backlog](#)

LABELS

[Local Government](#)

Description [Edit](#)

As a Local Government, I want to provide DOR updates of our boundaries so that the GIS system is accurate.

Acceptance Criteria [Delete](#)

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- Prescribed format, form, UI/UX or process for these updates? Is there one now, and does it need to change? Is there a requirement/desire to make these updates part of the system functionality?
- Time sensitivity to changes - how fast do they need to be updated in the system and reflected in the UI's, API, bulk etc. (Assume that there is no difference in those, that once the DB has changed all interfaces use the corrected data) Overnight, weekly, monthly, quarterly, etc.

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Deployment Tasks [Delete](#)

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- Deployment task 1

US#16 Public Developer - API described by RAML

in list [Product Backlog](#)

LABELS

Public Developer

Description [Edit](#)

As a Public Developer, I want an up-to-date RESTful API Modeling Language (RAML) document I can consult so that my software can accurately integrate with the Sales Tax GIS system.

Acceptance Criteria [Delete](#)

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RAML is published and available to all Public Developer

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Deployment task 1

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US#18 Public Developer - Ability to retrieve API key

in list [Product Backlog](#)

LABELS

[Public Developer](#)

Description [Edit](#)

As a public developer, I want the ability to retrieve an API key so that my application can securely communicate with the Sales Tax / GIS API.

Acceptance Criteria [Delete](#)

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US#19 Public Developer - Developer's Guide

in list [Product Backlog](#)

LABELS

[Public Developer](#)

Description [Edit](#)

As a community developer, I want to search an online developer's guide, provided on the DOR tax lookup site, so that I can access the API through my code.

Acceptance Criteria [Delete](#)

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Requirements list created from user story.

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