

County of San Diego Assessor/Recorder/County Clerk

ARCC InSite Employee Portal

Leveraging SharePoint for Business Efficiencies and Strategic Decisions

ENTERPRISE

OFFICE LOCATIONS – Map based solution that includes all ARCC office locations and primary contact details as well as other key county facilities. Solution includes both address information and coordinate information as well as contact details for posting on a dynamic Google-based web part. Solution is to provide assistance and contact information to new employees on services and locations.

PHONE DUTY – Calendar based list driven application that allows each business unit to maintain a rotating schedule of which staff are on phone duty for the identified shift. The application allows for easy updates as staff switch regularly. Calendar format is easy to view so that calls can be redirected appropriately and as needed.

LEAVE PLANNER – Calendar based database driven application that allows each business unit to collect and approve leave requests that can then be visible to co-workers for vacation planning. Views include hourly per day, week, and month as well as display/hide settings per functional unit to avoid information overload. Workflow and routing supports supervisor staff changes and re-assignments and includes email reminders and outlook calendar integration.

INFORMATION TECHNOLOGY PROJECT TRACKING – Form based database driven application used to track active projects and tasks associated with each project with milestone updates. Reports and dashboards include milestone dates and color coded graphical indicators on problem areas including scope, cost, risk, resourcing, and risk.

PEOPLE FINDER (PROFILE DATA & PICTURE MANAGEMENT) – Dynamic User Profile Based contact list and org chart integrated with Enterprise Active Directory and PeopleSoft. Provides at-a-glance contact information with picture of staff per location, per role, per title, and per business unit with search refinements available on all relevant metadata.

DEPARTMENTAL EXCELLENCE GOALS TRACKING – Key Performance Indicators showing progress made on yearly departmental goals

APPLICATION INVENTORY – List driven display of all servers, applications and application components maintained by the department. Used to identify impact to applications or business groups for upgrades, scheduled server maintenance or replacements, and scoping impact to new projects.

SERVICE REQUEST TRACKING – Wizard and database driven Service Request tracking and assignment application used to keep track of all open and pending IT requests for computer, phone and software adds/moves/changes. Application includes assignment to technical staff as well as contact information for requestor and supervisor and chargeback details.

ANNOUNCEMENTS – Out of the box SharePoint Announcement functionality enhanced to separate different types of announcements as well as announcement priority. Priority and type used to identify where within SharePoint Portal to post as whether the announcement should be accompanied with departmental or enterprise email notification.

EQUIPMENT INVENTORY – Form based database driven inventory application for compliance with yearly Auditor/Controller reporting. The mobile friendly application allows for the integration of a barcode scanner to read property identification numbers to update the inventory based on location across all of the department's locations as well as interfaces for property additions and removals.

CUSTOMER SERVICE HERO – Form based list driven application used to track and recognize staff that receive customer feedback. Application tracks feedback as well as generates certificates and provides emailed responses to those providing feedback.

ASSESSOR

STATE BOARD OF EQUALIZATION(SBE) TRAINING – Database driven application used to import and track State Board of Equalization training information for each certified Assessor. Data is imported every 6 months and then published to each user based on their user profile. This helps individuals and supervisors identify training deficiencies as well as warn those that are not meeting their continuing education requirements.

PARCEL INVENTORY REPORT – Database driven application used to collect and report on County of San Diego Property value information across 80 entities, 4 years and over 100 land use types. Data is used to perform reports for public online posting as well as public requests.

FIELD BOOK TRACKER – List driven in/out log for staff to track Field Books. Addressed previous issues with staff having no way to know who was currently using a particular book or when they may be done with it.

MARINE & AIRCRAFT CANVASS – Database driven mobile web application used to inventory all secured property including Vessels and Aircraft. Application allows the Appraiser to take several actions including updating vessel information, adding remarks, or taking pictures which is then synchronized with the central repository used to feed the line of business property tax system. System includes several reports, data validation, and exception reports.

FACTORED BASES YEAR VALUE CALCULATOR – Database driven search and calculation tool that takes raw parcel data from over 800,000 properties and applies a series of rules and filters to calculate increase or decrease in property value based on the Consumer Price Index. Application takes several

pieces of information into consideration including most recent change in ownership dates, and property type current year vs. roll year of property value.

ON-LINE PARS – Forms based database driven workflow solution that follows a multi-step routing and approval process for Property Appraisal Record (PAR) updates. This process had previously involved sorting and distributing printed PAR sheets to all ARCC locations on weekly bases which were then further sorted by area and book to appraisers once they reach the appropriate office. These PARS were then worked and sent through a multi-step approval and review before passing to data entry. The On-Line PARS application collects this information electronically and routes the work packages to the appropriate appraiser based on maintained assignment rules. Once approved the data is submitted to the line of business property tax system.

COMMERCIAL LEASING TRACKER – List based database driven application to collect and search for Commercial Lease Statistics. Application is used for comparison of leasing features for valuation of businesses for tax purposes. Application allows for filtering, sorting, as well as list and range searches using dropdown values and multi-select controls.

HOX CLAIM APP – Forms based and image enabled workflow for routing and assignment of Home Owners exemption claim forms that have been either submitted online or scanned. Documents are routed based on assignment rules and then reviewed and approved before data is posted to line of business property tax system.