



Assessment Community Enterprise System



ACES

June 2018 Update

Agenda

- Progress to date
- ACES overview
- Project timeline
- Security and authentication
- Infrastructure and data extracts
- Pre-conversion
- Conversion
- Sample screenshots (mockups)
- Training and support
- Questions





Assessment Community Enterprise System

Progress to Date

Progress

- September 2016: Request For Proposals was issued by the Tax Department and the Office of Information Technology Services (OITS).
- March 2017: Contract awarded to Tyler Technologies, Inc. Tyler Technologies' application will be customized and configured to meet our requirements.
- June 2017: Project Participation Survey to identify 200+ volunteers and 13 pilots

Pilots

Northern region

- Clinton County
- Towns of Glenville and Niskayuna
- Town of Queensbury

Central region

- Tompkins County
- Cayuga County
- City of Watertown

Southern region

- City of Yonkers
- Town of Rye
- Town of Greenburgh

Western region

- Orleans County
- City Of Niagara Falls
- Wyoming County

2017 Outreach Sessions

- In August, we met with the assessment and local government IT communities in each region of the state.
- Nearly 200 local officials attended and provided feedback.

2017 Outreach Sessions

We asked participants to respond to four questions:

- What are the best things about the system that you currently use?
- What are your current challenges?
- What are your expectations for the new system?
- What concerns do you have?

Best Things About Your Current System

- The price
- Historical data
- Data extracts
- Exemption processing
- Regional support

Challenges of Your Current System

- Lack of flexibility with documents/notes
- Insufficient audit trail
- Outdated functions

Your Hopes for the New System

Modernize into the 21st Century

- Mobile
- GIS
- Improved notes
- Automatic updates
- Ability to connect with other programs

What Concerns You

- Cost
- Loss of current functionality
- Will it be mandated?
- When will updates occur?
- How long will v4 be supported?
- Access:
 - capacity to handle many users at once
 - what if the system goes down?
 - remote areas with no internet connection

What Concerns You (cont.)

- Support
- Training
- Security
- Conversion issues
- Need for administrative restrictions



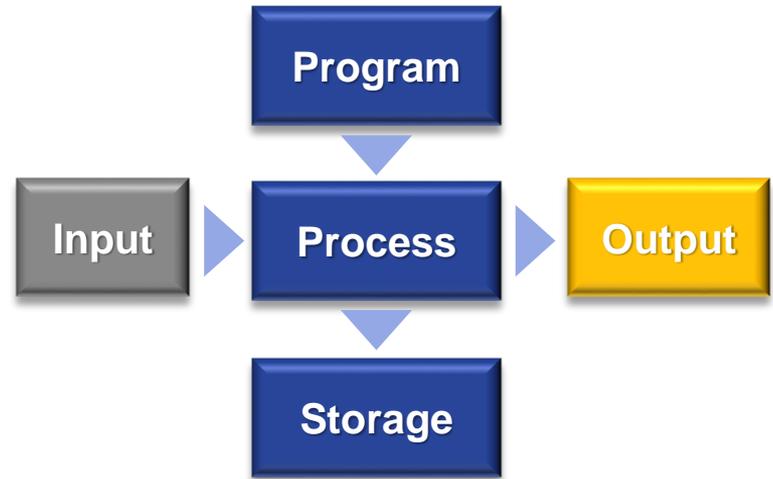
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ACES Overview

ACES Overview

Tiered web-based system uses modern technologies:

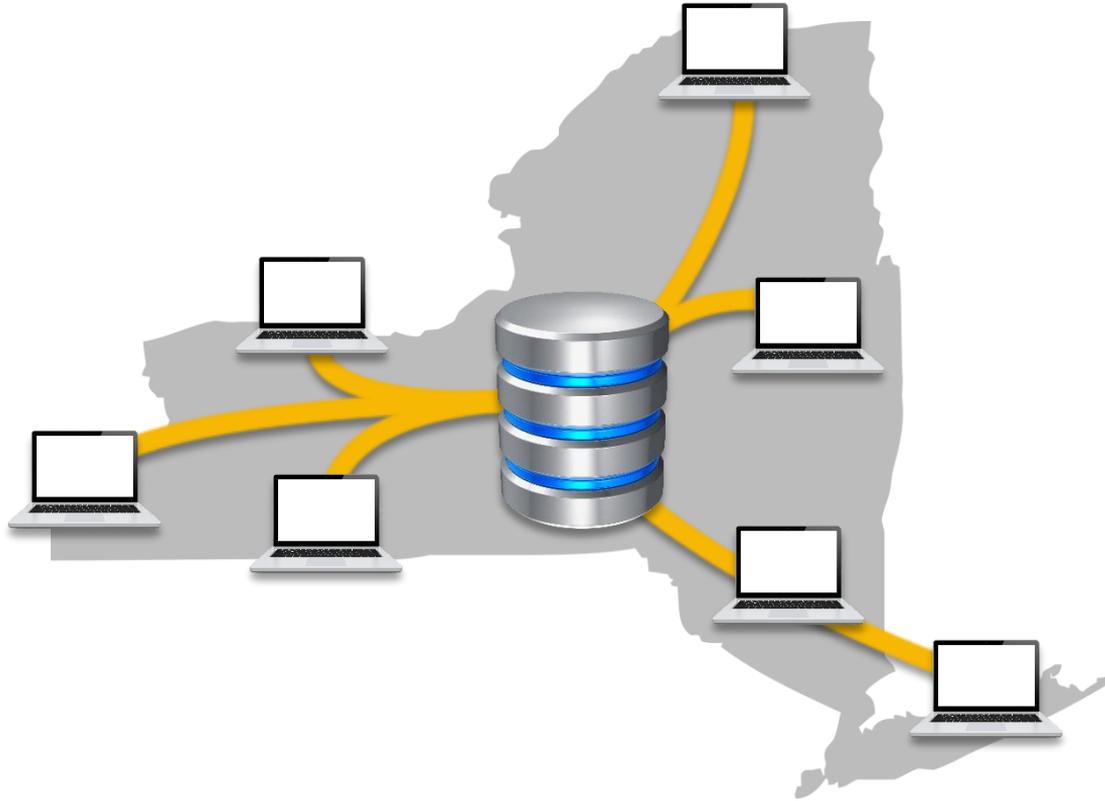
- thin client;
- middleware services; and
- a back-end enterprise-level database within a multi-tenant infrastructure.



RPSv4 = Decentralized System



ACES = Centralized System



Partitioned by Jurisdiction



System Functionality

- Assessment administration
- Document management
- Valuation
- Standard and customized reporting
- Sketching
- Data extracts

Improvements for Users

- All users run the same version
- Updates are centralized
- System is more efficient
- Search capability is enhanced
- Comparable sales analysis is improved
- Image and document management capacity is expanded

Improvements for Users (cont.)

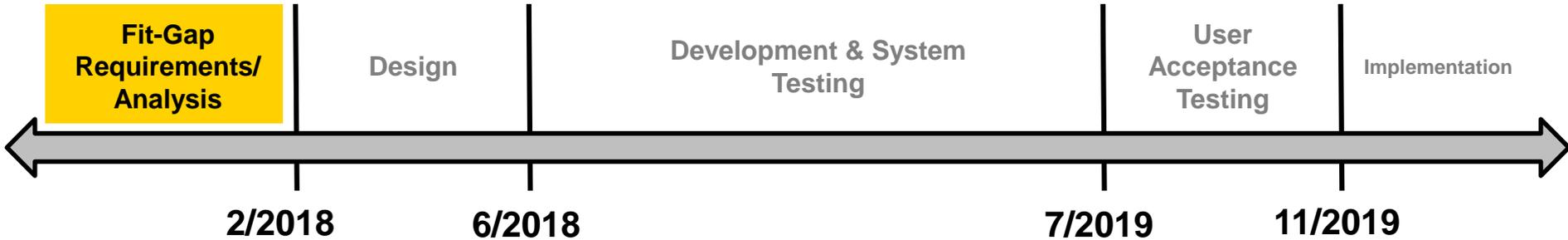
- Offers more robust and comprehensive online help facilities
- System improvements are evergreen
- GIS capabilities are enhanced
- Auditing is much more comprehensive
- Sketching is built into the system
- You can collect data using a tablet (online and offline)



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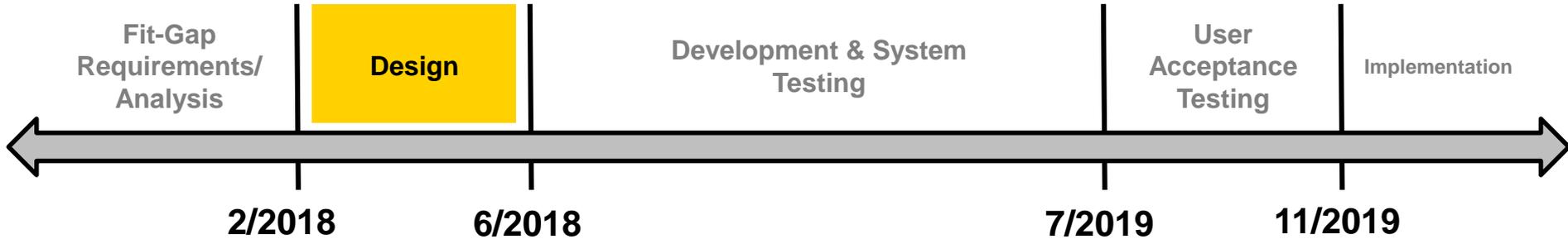
Project Timeline

Project Timeline



Gather requirements and analyze how the existing system compares to new system.

Project Timeline



Define and document the business rules.

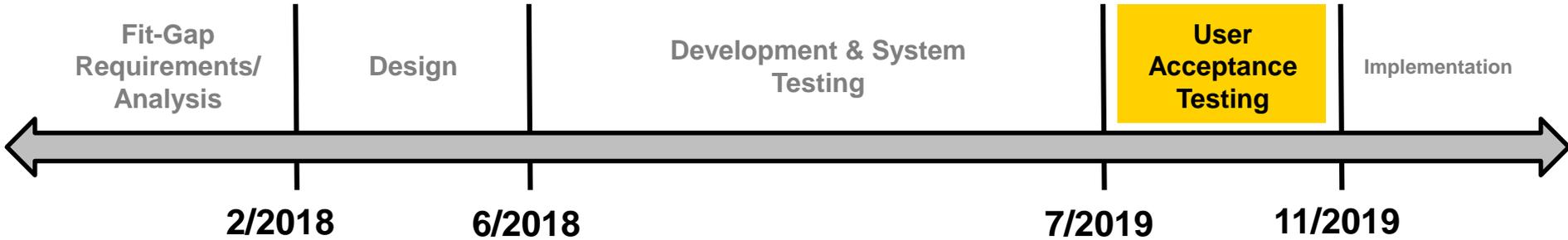
- 40 modifications
- 41 extracts
- 42 reports
- 200-plus configurations

Project Timeline



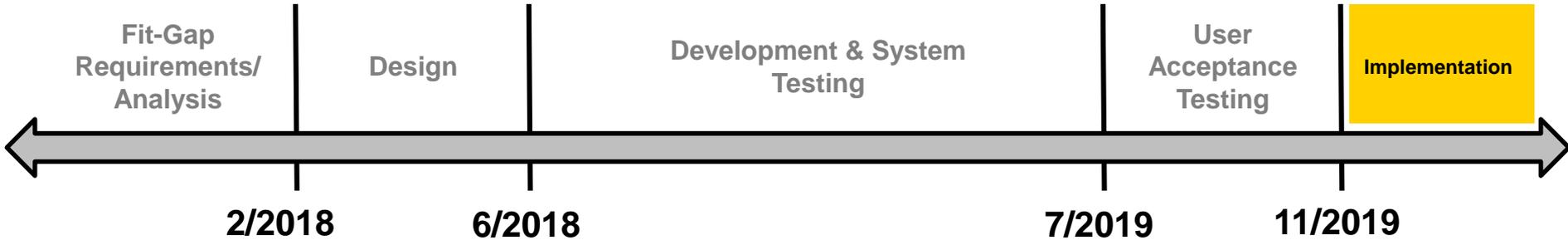
Customize the Tyler application, and test it internally.

Project Timeline



Pilots implement and test the system in parallel with current software.

Project Timeline



ACES becomes the system of record for Pilots.

Statewide Availability

- Align with local readiness and calendars
- Assessors, directors, and ORPTS local liaisons will work together to develop timeline and implementation steps
- Based on response, ORPTS will coordinate with municipalities to implement using a staggered approach
- Work with assessment officials on pre-conversion and conversion process.



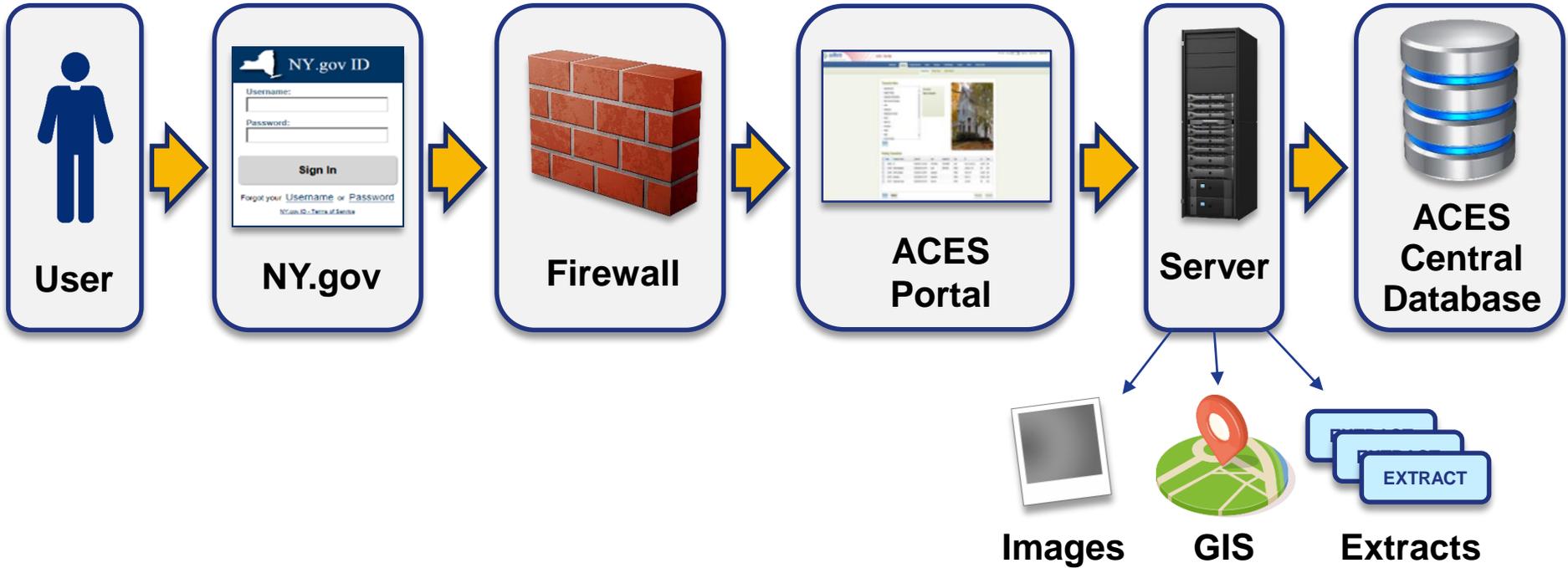
**Assessment Community
Enterprise System**

Security and Authentication

Security

- Application will follow New York State best practices.
- Access to ACES will require a NY.Gov ID. A process will be established and documented.
- Local administrators will:
 - tie NY.Gov ID to user
 - assign user permissions based on pre-defined roles.

ACES Portal





Account creation and delegation of roles

About Your Delegated Administration Account

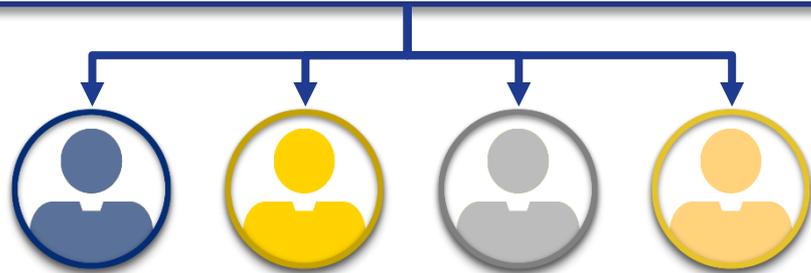
DA might not work properly on the following organization(s) / role(s) do not exist. Contact nygovda@ny.gov to fix the issue before attempting to use DA.

[Change Look and Feel](#)

You are currently logged in as: podsaclinton

Your PODSA scope is: Clinton County,Cayuga County

Transaction Name	Transaction Date	Line	Company No.	Type	Dr	Cr	Rate
...



Individual Users

(county directors, assessors, clerks, ORPTS staff)

Data security

- Update rights will only be available to users authorized by the jurisdiction.
- We will gather input and feedback from the pilots regarding what data elements need additional security applied (encryption).

Will follow New York State, ITS, and Tax Department guidelines for system security.

- HTTPS
- Robust enough to minimize risk of unauthorized access



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Infrastructure and Data Extracts

Municipality:

- High speed internet connection
- Dual monitors are recommended
- Printer for reporting
- Windows tablet if Field Mobile is to be utilized
- Optional accessories include: scanner, camera
- Requirement documents online soon

Infrastructure

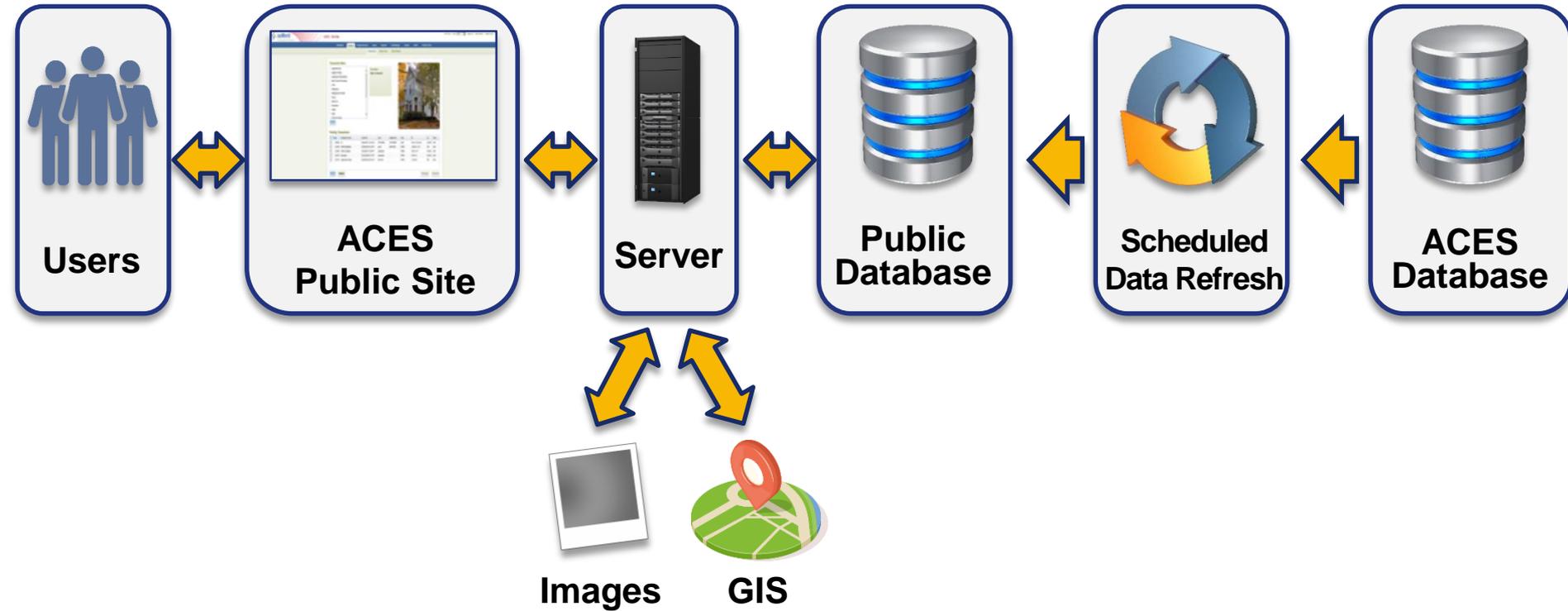
New York State

- Backup
- Disaster recovery
- Best time to do maintenance, updates, reboots, etc.

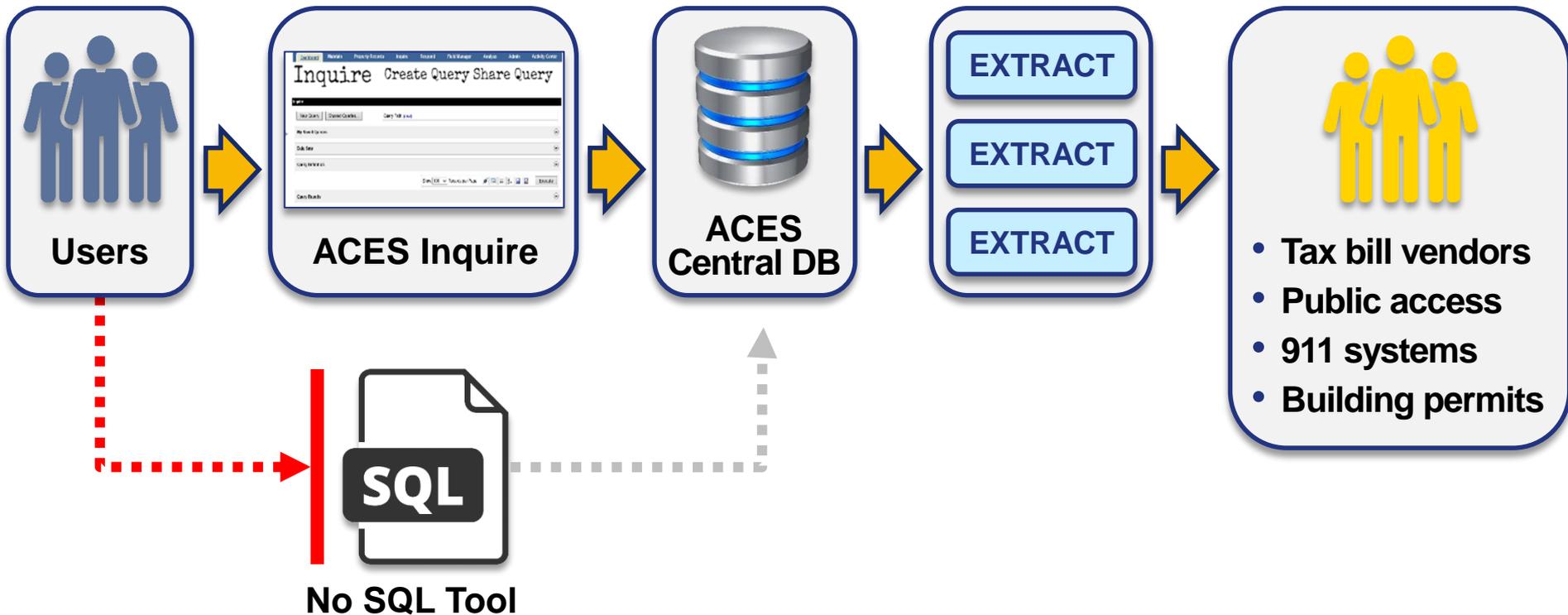
GIS

- Will need to ensure NAD83 is being used
- New York State will provide the parcel boundary layer and leverage the additional layers that exists at NYS-GIS or from counties

Public Access to ACES



Data Extracts





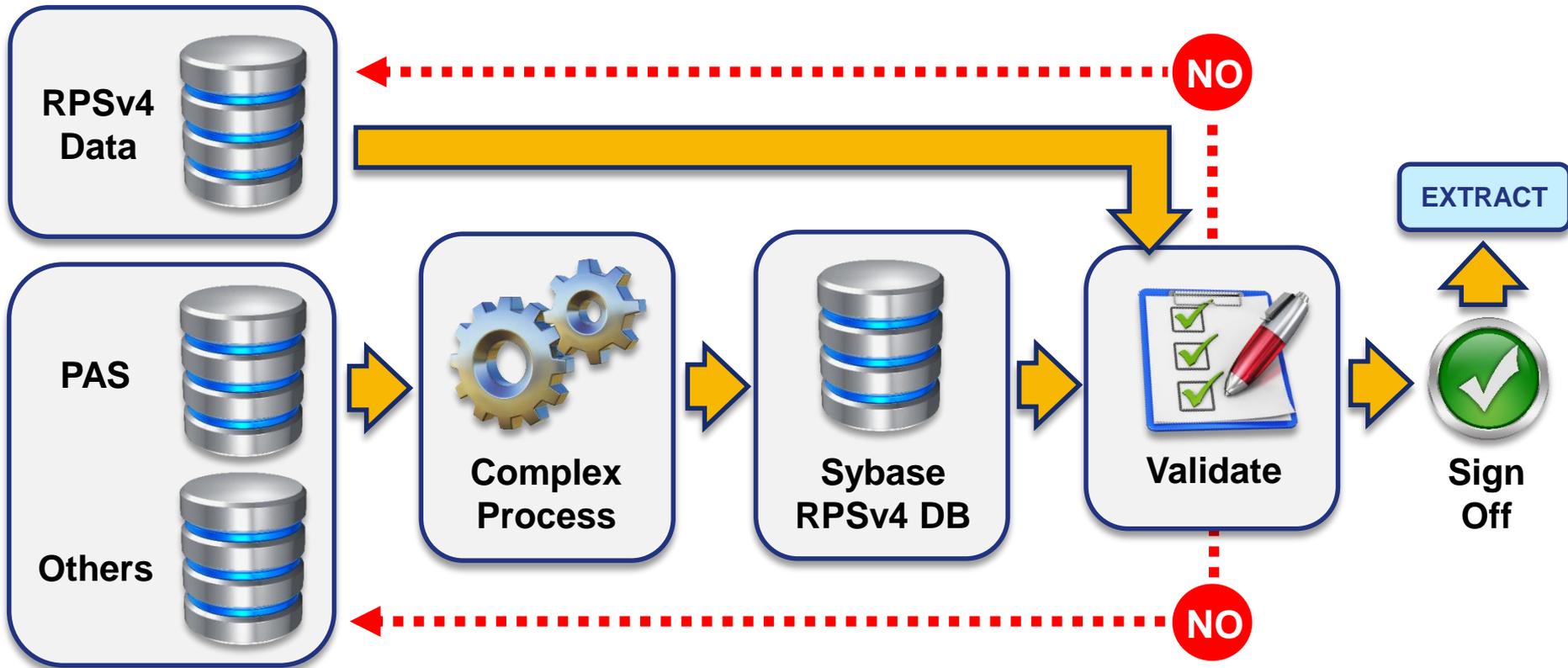
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Pre-conversion

Pre-conversion

- ORPTS and ACES team will work with local municipalities on data preparedness.
- Data Anomaly Finder (DAF) will identify data issues. We'll provide DAF this summer.
- Reports would be identified for validation.
- Local jurisdiction will need to sign-off on pre-converted data.

Pre-conversion

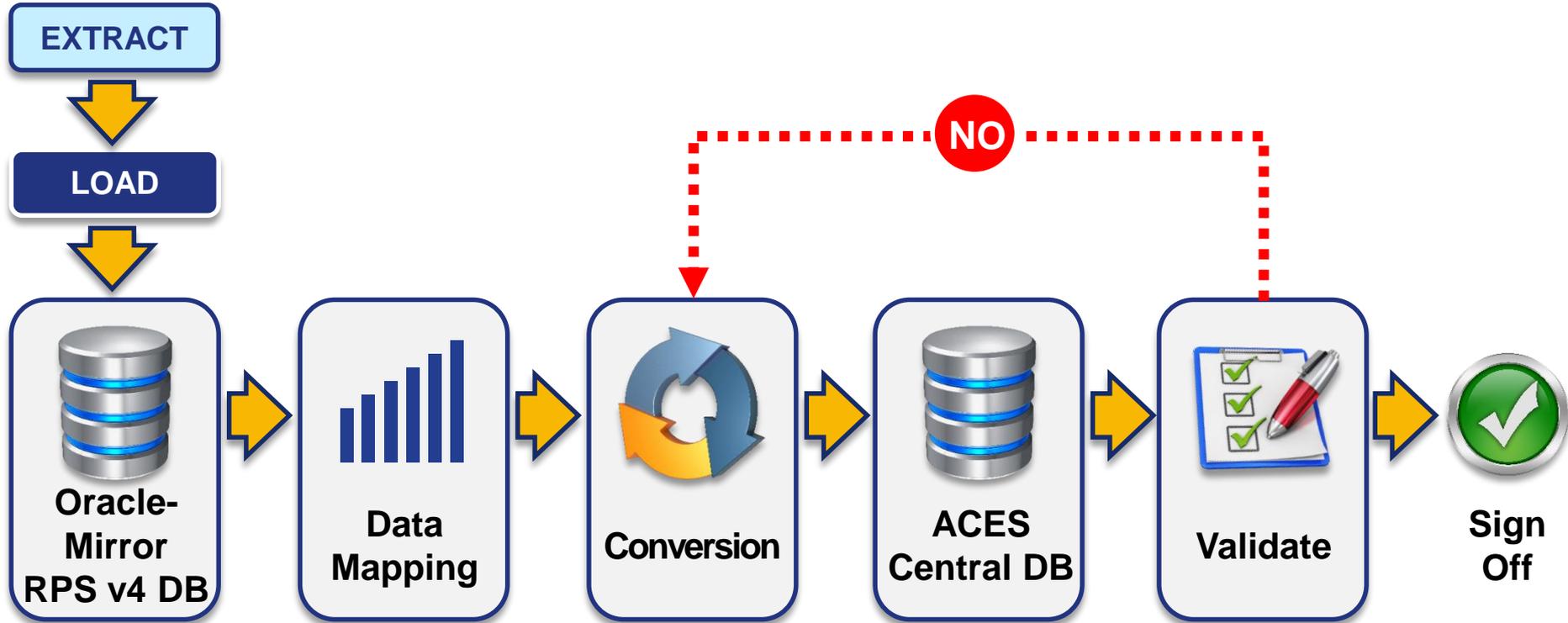




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Conversion

Conversion



Conversion

- ORPTS and ACES team will work jointly with local municipalities on data conversion.
- ACES to provide data extracts or reports for validation and fixing during the conversion process.
- Balancing reports will be provided before and after data is converted.
- Local jurisdiction will need to sign-off on converted data prior to using the application.

Conversion

Documents and Images

- Municipalities will identify documents and images that will be hosted in ACES for bulk upload.
- Documents will be converted based on recommended file types (similar to RPSv4).
- Images need to be resized accordingly.
- Documents have to be free of malware and viruses.



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Training and Support

Training

- We'll develop training in consultation with:
 - the ORPTS Regional Teams,
 - Tyler Technologies,
 - the RPS Governance Group, and
 - the Pilots.
- Months before you convert, we'll begin the training program with you.
- The training will include classroom and online tools.

Support

We will have multi-tiered support for ACES, which will include:

- ORPTS Regional Liaisons,
- Centralized RPS Support Team, and
- New York State Call Center.



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