



## Santa Clara County Agriculture and Environmental Management – *The Daily*

### Why Choose CaliCo Solutions?

CaliCo Solutions is a full-service software design, development, and management firm whose partners have been developing custom software for a wide variety of clients and industries for more than twenty-five years.

During that time, we have seen a number of technologies come and go, but the core needs of our clients have remained the same – targeted, effective software applications that solve real-world business problems and have a measurable impact on improving performance.

The Santa Clara County Agriculture and Environmental Management Department needed to replace two tracking applications with a single, web-based application using current technology. County staff used separate applications for tracking agricultural and weights & measures inspections, often at the same locations.

**CaliCo Solutions staff worked with the County to design and implement a new tool that:**

- 1) tracks all types of inspection activities
- 2) serves as a timesheet program to electronically manage professional, management, and administrative activities
- 3) provides a State-audited accounting system for automated invoice generation, payment tracking, and financial reporting
- 4) records complaints, illnesses, appointments, and other County business requiring followup and calendar management
- 5) prepares automated State and County reports

The new tool, named “*The Daily*” has been successfully streamlining business at Santa Clara County for almost a decade and is being adopted by other California counties to manage their Agriculture and Weights and Measures programs with the same level of efficiency.

The Daily keeps track of employees by their Division and by their specific responsibilities, whether it be geographical or for a particular type of Business or Inspection. When entering the application, the user sees a set of Action Items that are due within a specified, user-adjustable outlook (days, weeks, etc.). Action Items are created automatically by recurring Inspections coming due at pre-set time intervals, by required responses to Complaints entered into The Daily, or from ad hoc assignments that are issued to a staff member, always with a due date.

Each inspection type has a unique data entry screen, custom-designed for the specific requirements of the inspection form and report. The forms auto-validate as data is entered, ensuring complete and correct capture of required information. All of the required forms are automated and can be generated in any combination, date range, and format (pdf, xls).

**1** Pick A Division:

Agriculture

Weights & Measures

Select Report  Select All

Agriculture

- 0 - Ag Rollup
- 1 - Pest Detection
- 2 - Pest Eradication
- 3 - Pest Management
- 3 - Pierce's Disease
- 4 - Pest Exclusion
- 5 - Pesticide
- 6 - Seed Inspection

**2** Pick A User:

All

Show all users

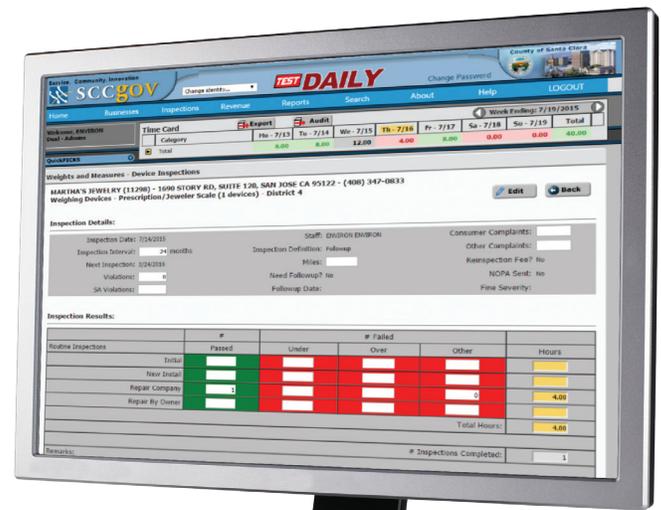
Pick a Period:

Month: June

Year: 2015 (yyyy)

As inspections are entered, users enter inspection hours which roll-up into each staff member's time card. Items like training, sick time, etc. can be added directly into the time card. Clues are apparent as staff work their way through their week: cells on the "Total" row are initially red, indicating time still needs to be entered for that day. When the standard 8-hr day is reached, the cell shading will turn to green. If more than eight hours are entered, the hours appear black and bold. The total hours for the week has the same pattern.

Category	Mo - 7/13	Tu - 7/14	We - 7/15	Th - 7/16	Fr - 7/17	Sa - 7/18	Su - 7/19	Total
Total	8.00	8.00	12.00	4.00	8.00	0.00	0.00	40.00
Planned	0.00	0.00	0.00	4.00	0.00	0.00	0.00	-4.00
AG Inspection		4.00	8.00					12.00
WM Inspection		4.00						4.00
AG Professional Support								0.00
WMS Professional Support								0.00
Investigations			4.00	4.00				8.00
Office Time	8.00							8.00
Training								0.00
County Training					8.00			8.00
Workers Comp								0.00
Holiday Leave								0.00
Vacation Leave								0.00



**Transaction Ledger**

Invoice Reinspection Invoice Non-Compliance Account Adjustment

Please select a business:  Multiple Businesses  Non-Business Transactions  Cancelled/Revised Items

Transaction Type: All

From:  To:

Refresh Enter SAP Doc#

Reset

Found 14 matching transactions

06/20/2014 10:19	Payment	Invoice: #2015-002561, due 6/30/2014, \$716.50	Print Type: Check	\$716.50
05/20/2014 07:42	Invoice	Inv #: 2015-002561 Inv Date: 5/20/2014 Due Date: 6/30/2014	To: REGISTRATION FIRST INVOICE - PAID	(\$716.50)
06/11/2013 08:41	Payment	Invoice: #2014-002492, due 6/30/2013, \$716.50	Print Type: Check	\$716.50
05/22/2013 09:18	Invoice	Inv #: 2014-002492 Inv Date: 5/22/2013 Due Date: 6/30/2013	To: REGISTRATION FIRST INVOICE - PAID	(\$716.50)

Account Balance: \$0.00

The Transaction Ledger in The Daily provides full double-entry bookkeeping for annual registration invoices as well as ad-hoc inspection invoices. Late notices can be automatically generated and delivered, and payments are tracked with complete accounts aging details. The process of generating thousands of annual device registration invoices has been completely automated, including all of the complex details and fee caps applied within the County. Once payments are made in full, the system generates the printed Santa Clara County Weights and Measures Certificates for display by the business. The accounting system has been reviewed by the State auditor and found acceptable for tracking payments made in cash, by check, or by credit card – detailed translation approval and reporting functions ensure complete confidence in the financial data supplied by The Daily.