

With Datawatch|ES, Santa Clara County Reduces Paper-Based Reporting and Starts Reaping the Benefits

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Located at the southern end of the San Francisco Bay, Santa Clara County, California has long been considered one of the best areas in the United States in which to live and work. A major employment center for the region, Santa Clara County provides more than a quarter of all jobs in the Bay Area, and serves as home to nearly 1.7 million residents. Santa Clara County government provides key services such as health and hospital, environmental, property assessment and tax collection, law enforcement, jail, road maintenance, parks and recreation, voting registration and much more, as well as locally administering statewide services.

Managing the business of county government is inherently a very paper-intensive process, usually with no easy way to work with the data buried within thick paper reports. Santa Clara County, however, has effectively managed its reporting and data needs, thanks to Datawatch|ES, the web-based report archival, distribution and data analysis solution from Datawatch Corporation. With Datawatch|ES, Santa Clara County keeps the reports and data that managers and workers need, without the paper.

THE CHALLENGE: REDUCE RELIANCE ON CUMBERSOME PAPER REPORTS; MAKE DATA EASY TO USE

The Information Services Department (ISD) of Santa Clara County is responsible for printing, bursting, and boxing thick accounting reports for delivery to various agencies at different locations with the county. “The delivery process of paper reports used to range anywhere from a few hours to a few weeks, depending on the report in question,” said Moe Pal, Business Consulting and Project Services Manager of

Santa Clara County. “We also needed to store certain reports – often thousands of pages in length – for over seven years. The cost and size of needed storage rooms and cabinets was very significant as well.

“Satish Ajmani, the CIO of Santa Clara County, was instrumental in identifying the need to reduce hard copy in the County,” Moe says. “Under his direction, the Information Services Department undertook an initial study that focused on the high volume printing that was done at ISD for its many customers. Shortly afterwards, a specific business case was established.

“Our Finance Agency — Controller’s Office reviewed how various county agencies were working with the accounting reports they were receiving. The results were the same across agencies: they were manually entering massive amounts of data from their paper reports into MS Excel or Access in order to analyze the data. Such redundant rekeying of data is an error-prone process that wastes valuable employee time and limits the ability to act upon data in a timely manner.

“This review substantiated the need to move to a technology solution that would not only end the massive amounts of paper printing, but also end the massive amounts of data rekeying, and make it easy to work with data. Datawatch|ES solved both of these critical needs for Santa Clara County in one system.”

THE SOLUTION: DATAWATCH|ES FOR PAPERLESS REPORTING, PLUS EASY DATA ANALYSIS

“One of the key reasons we selected Datawatch|ES was that it reduced the ‘pain’ in effectively using accounting data across the county,” said Lorraine Leipold, Sr. IT

“Over 600 county managers and workers now access their reports and data anytime through Datawatch|ES. They are now able to work much smarter with their reports and data. No more working with ‘stale,’ weeks old reports, no more rekeying report-based data into Excel or Access. These new capabilities, combined with clear cost savings, mark a major step forward for Santa Clara County’s reporting and data infrastructure, thanks to Datawatch|ES.”

Project Manager for Santa Clara County. “Customers not only reap the benefits of accessing the reports online, but they receive the reports automatically as well.

“First, Datawatch|ES indexes and archives reports based on content, so each individual user can only access those report sections pertaining to their own department. Also, the Datawatch|ES solution is completely web-based, with a user-friendly look and feel. With Datawatch|ES, users can select and view their reports online, add annotations, and more.

“Second, Datawatch|ES users not only can view their reports online, but also extract all of the data from the report with one click. Now they are no longer working with a report, they are working with data, with no rekeying, and no programming. They can export the data to Excel at anytime, and as an option, some ES sorts and filters have been set up to provide additional functionality within ES. We found Datawatch|ES’ ability to easily and automatically bring report-based data into Excel made the Datawatch solution preferable over other alternative solutions.”

FROM ACCOUNTING AND PEOPLESOFT REPORTS, TO LIVE DATA

“Fixed asset management became easier for at least one major agency, thanks to Datawatch|ES,” says Lorraine. “Accountants now have the ability to bring data from accounting reports and related data from reports produced by a separate fixed asset system, into one Excel worksheet, for easy comparisons.

“With Datawatch|ES, it’s suddenly easy to reconcile the data from two separate systems. Before Datawatch|ES, such audit work would have been extremely difficult, if possible at all.”

In addition to accounting reports, Santa Clara County also stores and distributes HR and payroll reports produced by the county’s PeopleSoft system. “Our departments need a lot of information on existing employees, as well as any changes in employment status or payroll,” explains Kim Ruebenson, Management

Analyst, responsible for reporting for Santa Clara County’s Human Resources Payroll Project (HaRP). “Like the county’s accounting reports, we used to print, burst and distribute many different HR and payroll reports. Most of the reports are very large: our bi-weekly payroll reports are typically 2,000-3,000 pages long.”

“We now archive over twenty HR and payroll reports into Datawatch|ES,” Kim says. “In addition to the paper savings, we also recovered the time of one person (full time equivalent, or FTE), who previously had to use one entire day per pay period, just to sort, burst and address envelopes for the mailroom, as well as other FTEs who would then sort and deliver the reports to their final recipients.”

“Our PeopleSoft users see the biggest benefit of Datawatch|ES in terms of immediate access to information,” says Kim. “They can quickly and easily answer HR and payroll-related questions from managers and executives. Datawatch|ES is easy to use, easy to analyze PeopleSoft data. Our users now have the ability to be far more productive, and are very happy.”

DATAWATCH|ES ROI FOR SANTA CLARA COUNTY: LESS PAPER + MORE DATA = COST SAVINGS + SMARTER WORK!

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“Over 600 county managers and workers now access their reports and data anytime through Datawatch|ES,” Lorraine adds. “They are now able to work much smarter with their reports and data. No more working with ‘stale,’ weeks old reports, no more rekeying report-based data into Excel or Access. These new capabilities, combined with clear cost savings, mark a major step forward for Santa Clara County’s reporting and data infrastructure, thanks to Datawatch|ES.”



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