



# County of San Joaquin, CA

## Customer Success Story-Government

Originally organized in 1850, the San Joaquin County government provides a variety of services to an estimated 613,000 citizens across 1,400 square miles. Seven cities are incorporated within the county and include: Escalon, Lathrop, Lodi, Manteca, Ripon, Stockton, and Tracy. The County is comprised of 30 departments, each responsible for delivering services mandated by the state and federal governments. Some of the many services the county provides are legal services, jails, neighborhood parks, a public airport, voting services, work training programs, food programs, housing services, public safety, road maintenance, health services, business and economic development, library services, a zoo, and a historical museum.

Because of the vast amount of important documents it handles, it is vital for San Joaquin County to utilize a system of organization for its documents. Originally the County utilized a standard filing system which included filing cabinets and boxes. Seeing the need to improve this time-consuming and burdensome filing process, the county began looking at document management systems. "We were looking for a way to streamline both document organization and archival as well as facilitate a mechanism to deliver our board packages to our clerk of the board, in a more user friendly way than we were currently doing," states Marc Shorr, Assistance Director for the County of San Joaquin.

*"What we have been able to scan and get rid of in storage is tremendous. I can't even think of how many thousands of boxes we have been able to destroy because we have archived. We go back and scan 2 to 3 thousand vouchers a day, every day, and we are now scanning all of that information rather than photocopying and filing it."*

A variety of other document management solutions were examined prior to choosing Questys Solutions. "We looked at other systems, but we had a couple other departments already using Questys. When we did our evaluation, we felt that we did want to standardize. And the responses we got back from other departments utilizing Questys were positive," explains Shorr.

Currently, San Joaquin County utilizes Questys Enterprise, Document Management System. The base server scans paper documents, and imports electronic files and e-mail. Users can then OCR, edit, and store information in electronic format for instant retrieval. Additionally, the County has purchased several add-on modules including LegisStream,

Marc Shorr  
Assistance Director  
San Joaquin County

Workflow, Web, Digisign, Searchable CD, and Applink. Together, these products assist the county with agenda automation, publishing agenda packets to the internet, e-mail integration, activity logs, revision control, and Granicus integration. "We create and store all kinds of files. We work a lot with word documents, but we are scanning in all kinds of files. We are looking at scanning in geographical files, court files, and HR documents. The accounting and auditors control office is utilizing the system to do all voucher and payment information," states Shorr.

Since the implementation of Questys Enterprise, the county of San Joaquin has seen improvement in employee productivity and efficiency levels. "It saves someone from having to go to a filing cabinet and dig through to try and find something. We can now use the index feature and search and find it. We are also integrating it with our People Soft Financial so that we can actually link to it and go directly to it from within People Soft," states Shorr.

The use of electronic file sharing has further improved the communication between county employees. "It is helpful when we submit a board package. Particularly, when a department submits it, and has questions about its contents. People do not have to search and find different attachments because it is all attached and scanned into the one package. Everyone can have a discussion on a particular issue or question and they all have relevant material handy," states Shorr. Because of the benefits it has provided them, the county of San Joaquin has stated that they would recommend Questys Solutions to other organizations.

### Overview:

#### ORGANIZATION

San Joaquin County, CA

#### LOCATION

San Joaquin, CA

#### INDUSTRY

Government

#### NO. OF EMPLOYEES

100 people within 20 departments utilize Questys

#### BUSINESS CHALLENGE

- Local government looking for a way to streamline document organization and archival.

#### SOLUTION

- Questys Enterprise: an intelligent and flexible electronic document management solution designed for government agencies.
- LegisStream: automates the entire agenda process.
- Workflow: streamlines an organization with electronic workflow and approval routing capabilities.
- Digisign: creates, and edits images, stamps, and signatures to be applied electronically.
- Web: provides fast, secure and reliable web access to users around the world.
- Applink: integrates Questys into compatible 3rd party software applications.
- Searchable CD: allows users to copy and export any portion of their Questys Database to a searchable CD.

#### RESULTS

- Searchable database has allowed employees quick access to the information they need.
- Questys Enterprise database has provided a means for file backup.
- Communication among city departments has improved.
- Employee productivity and efficiency levels have increased.

