



CASE STUDY WATER UTILITY

Aqua America, Inc.

Accounts Payable

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Leon Chain
Controller, Mid-Atlantic Region
Aqua America, Inc.

Aqua America, Inc. is the nation’s largest U.S.-based, publicly-traded water utility, providing water and wastewater services to approximately 2.5 million residents in Pennsylvania, Ohio, Illinois, Texas, New Jersey, Indiana, Virginia, Florida, North Carolina, Maine, Missouri, New York and South Carolina. Aqua America also provides water and wastewater consulting and contract operations and management services to selected clients.

Aqua America realized that replacing paper file storage with an electronic document management system would improve document retrieval time, information sharing and productivity. After evaluating several products, company administrators determined ImageNow document management, imaging and workflow suite was the best fit for the accounts payable department.

“The ability of ImageNow to integrate with our Lawson® system was the main reason we selected the product,” says Leon Chain, Mid-Atlantic Region controller. “We decided it was the best solution to our recordkeeping and invoice processing issues.”

Seamless Integration Speeds Document Retrieval

Using patented LearnMode™ technology, ImageNow seamlessly integrated with Aqua America’s Lawson Financials system. Integration creates a direct link between documents stored in ImageNow and host system records, giving users single-click document access from their host application screens.

“As we process invoices, ImageNow links each one to the relevant document in Lawson Financials, making it easy for employees to retrieve documents that support transaction records in Lawson,” Chain says.

Hands-on implementation and training helped prepare Chain and his colleagues to manage ImageNow independently, and facilitated an early knowledge transfer to Aqua America’s entire ImageNow user base. Employees have responded positively to the user-friendly ImageNow interface.

“I’m no rocket scientist, but ImageNow is so intuitive that anyone can use it,” Chain says. “Even employees who don’t often use ImageNow find it easy to quickly pull up the documents they need.”

Overcoming Compliance Challenges

Aqua America has sites in 13 states and each state has separate regulatory bodies that oversee the operations of utilities providers. These commissions require Aqua America to submit invoices and other financial documentation for auditing periodically, to ensure that the company complies with regulatory statutes. As a publicly traded entity, Aqua America is also subject to the requirements of the Sarbanes-Oxley Act.

ImageNow reporting features enable Aqua America to track each document throughout its lifecycle and to prove to auditors that financial documentation is processed in a defined, repeatable process through ImageNow workflow channels.

“During each audit, auditors ask us to pull several hundred invoices and other documents for review,” Chain says. “With paper files this took weeks, but with ImageNow it takes minutes.”

Section 404 of the Sarbanes-Oxley Act charges senior managers with the responsibility of documenting and ensuring the integrity of their companies’ internal financial controls. Chain finds that managing documents electronically in ImageNow improves the visibility of financial documentation, making it easier to satisfy Section 404 criteria than when Aqua America used paper records.

“ImageNow has helped with Sarbanes-Oxley Section 404 compliance,” Chain says. “It gives our auditing group another level of assurance that our recordkeeping is accurate.”

Increasing Productivity

Aqua America staff members once spent hours manually sorting, archiving, duplicating and retrieving 300,000 pages of invoices, checks and other financial documents the company receives and creates each year. Accounts payable associates now scan and import these documents into ImageNow. The eradication of manual processes allows workers to focus on other job responsibilities.

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A Positive Vendor Relationship

Perceptive Software’s customer-focused business approach gives Aqua America the freedom to determine the timing and extent of technical support. Chain is satisfied with the quality of assistance that the Perceptive Software Professional Services group provides.

“We have a tremendous relationship with Perceptive Software employees,” Chain says. “As we’ve expanded ImageNow, they’ve been supportive every step of the way.”

Implementing ImageNow helped Aqua America speed its financial processes, elevate productivity and satisfy regulatory requirements, benefits that will be compounded as the company expands ImageNow to meet its changing document management needs. Chain encapsulates Aqua America’s ImageNow experience when he says, “Selecting ImageNow is one of the smartest things I’ve done as a financial manager of this company.”



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Quick Stats

- Pages scanned into ImageNow annually: 300,000
- Integration: Lawson Financials
- Products in use: ImageNow, WebNow, CaptureNow

The Challenges

- ▶ Integrate with host systems
- ▶ Comply with regulatory mandates
- ▶ Manual processes divert employees away from other job responsibilities
- ▶ Provide accessible functionality to users with varying levels of IT proficiency

The Results

- ▶ Tight links with multiple business applications speed document retrieval
- ▶ Improved visibility of financial information ensures compliance with multiple mandates
- ▶ Eliminating filing and other menial tasks boosts productivity
- ▶ Intuitive interface gives all users an easy way to manage documents electronically

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