

Aqua America

Replacing paper processes with Perceptive Content from Lexmark in the accounts payable (AP) department made invoice processing and audits more efficient and less capital-intensive. Seamless integration between Perceptive and Lawson Financials enables users to retrieve the supporting documents they need to complete daily tasks from their Lawson screens. Perceptive Content's reporting features also enable Sarbanes-Oxley auditors to verify that all documents pass through an appropriate approval process.

Challenge

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 the Perceptive Content was the best fit for the accounts payable department.

"The ability of Perceptive Content 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."

Solution

Seamless integration speeds content retrieval & processing

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

"As we process invoices, Perceptive Content 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 Perceptive Content independently, and facilitated an early knowledge transfer to Aqua America's entire Perceptive Content user base. Employees have responded positively to the user-friendly interface. "I'm no rocket scientist, but Perceptive Content is so intuitive that anyone can use it," Chain says. "Even employees who don't often use Perceptive Content find it easy to quickly pull up the documents they need."

Meet Aqua America

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 13 states from Maine to Missouri. Aqua America also provides water and wastewater consulting and contract operations and management services to selected clients.

- ▶ **States:** 13
- ▶ **Customers:** 2.5 million
- ▶ **Focus:** Water and wastewater services

Products in use: Perceptive Content, Perceptive Capture

Integration: Infor Lawson

Results

Overcoming compliance challenges

Each of Aqua America's 13 sites operates under a separate state regulatory body that oversees utilities providers. These commissions require Aqua America to submit invoices and other financial documentation for periodic audits, to ensure the company complies with regulatory statutes. As a publicly traded entity, Aqua America is also subject to Sarbanes-Oxley Act requirements. Perceptive Content's reporting features enable Aqua America to track each document throughout its lifecycle and prove to auditors that financial documentation is processed in a defined, repeatable process through Perceptive 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 Perceptive Content 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 Perceptive Content improves the visibility of financial documentation, making it easier to satisfy Section 404 criteria than when Aqua America used paper records.

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

Forging a lasting partnership

Lexmark's customer-focused business approach gives Aqua America the freedom to determine the timing and extent of technical support. Chain is pleased with the quality of assistance that Lexmark professional services provides.

"We have a tremendous relationship with Lexmark employees," Chain says. "As we've expanded the software, they've been supportive every step of the way." Implementing Perceptive Content helped Aqua America speed its financial processes, elevate productivity and satisfy regulatory requirements, benefits that will be compounded as the company expands its use of the Perceptive portfolio to meet its changing document management needs. Chain encapsulates Aqua America's experience when he says, "Selecting Perceptive Content is one of the smartest things I've done as a financial manager of this company."

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