

# FusionDox Case Study: Neptune Technology Group

## Connecting Documents, Data, and People

*FusionDox not only manages your documents, it connects your data and people on an enterprise level. Even people that work in the field can access and be part of your processes and document flow.*

- The Java platform provided consolidated, robust data integration with 3rd party databases and applications
- Integrated customizable forms, procedures, and workflows enhanced and decluttered document approvals process
- FusionDox significantly reduces overall costs in ownership and outsourcing fees

Neptune Technology Group Inc, subsidiary of Roper Industries, Inc [NYSE: ROP] is a global provider of data collection systems and water measurement products that provide revenue optimization, operational efficiencies, and improved customer service within the utilities marketplace. Along with manufacturing a range of residential and industrial water meters, Neptune also provides a suite of field management tools including meter reading, service work orders, and route optimization software that is used by 32 of the largest 100 utility companies in the U.S. that collectively represent more than 50 million customers.

### Motivations For Change

Neptune's continued growth, forward looking business strategies, and new control requirements regulated by the Sarbanes/Oxley Act began to expose the need for a better way to manage their extensive document and work flow process within the company. Implementing a system that would control document revisions, manage document life cycle, and tie together external related data from multiple sources would allow Neptune to more efficiently manage its resources and reduce its costs in maintaining their customized Lotus Notes environment.

Having relied on Lotus Notes for several years, Neptune recognized that Lotus's proprietary development platform and functional challenges posed numerous obstacles that were compromising both resources and budgets. Neptune needed more flexibility and better integration with external applications such as their manufacturing databases and CRM data. In addition, using Lotus was forcing Neptune to outsource labor each time they wanted another level of specialization. Issues such as data migration, custom applications, and connection to external applications were difficult at best and typically required costly and sometimes hard to find outside programmers and consultants.

### The FusionDox Solution Implemented

Having made the decision to migrate from Lotus, Neptune's IT Manager **Bob Brown** itemized key criteria which would be used to evaluate and select a new software solution that would more efficiently connect their data, documents, and people.

*"We looked at numerous criteria to help us make our selection and FusionDox really stood out on several levels..."*

**Bob Brown, IT Manager**

Of these, four primary factors were key in Neptune's selection of FusionDox as their data/document management platform:

#### Extensibility/Customization

Integration with the Java and CF programming languages would mean that FusionDox's extensibility and maintainability would give Neptune a vast amount of flexibility. Creation of custom snap-ins, portals, integratable forms, workflows, and procedures would be accomplished via their in-house programming resources with little or no training. Issues of proprietary code and expensive programmer outsourcing would be eliminated.

*"For instance, I was able to quickly develop a custom Engineering Change Notice form that consolidated the document's [approval] status, integrates routing controls and notifications, and ties change permissions to assigned personnel. We've already had personnel commenting that the approvals process is much easier and workflow is a lot more flexible..."*

**Aaron Stephens, WEB Applications Specialist**

### **Extending Data Integration**

FusionDox's ability to integrate with external data from 3<sup>rd</sup> party applications would provide Neptune with significant improvements to internal workflow and communications. Islands of data residing in various critical business applications, such as the Customer Relationship Management and manufacturing systems, could now be readily associated via FusionDox's custom reports and portals providing users with a unifying, informative environment and management with a dashboard of data they can use to effectively monitor their department's metrics for success.

### **User Interface**

FusionDox's simple and recognizable interface is giving Neptune's spectrum of user's the tools they need without having to undergo extensive training. Having reviewed the product in an evaluation environment for three months, Neptune became quickly aware that FusionDox's intuitive interface and its ability to extend access to users via a web browser would provide access previously not available.

*"External access in the Lotus environment was very challenging. FusionDox's remote access via a web browser was highly desirable to us. Our mobile employees are now part of the document review process without having to be physically present. That alone has significantly speeded and decluttered the approvals process..."*

**Bob Brown, IT Manager**

### **Summary**

Having successfully implemented the FusionDox solution, Neptune is enthusiastic about the benefits they are experiencing with FusionDox's full feature set put into use.

- ISO 9000 change control compliance and quality audits easier to conduct.
- Sarbanes/Oxley compliance. Revision and lifecycle controls means reduced external auditor billings. Collation and association of documents and data generated in 3<sup>rd</sup> party applications.
- Enhanced CRM data. Connectivity to all data associated with customers.
- Workflow and procedures formalized and structured. Improves efficiency and quality.
- Streamlined Engineering Change Notice process and allowed the inclusion of field personnel via web browser access.
- Significant cost savings by using readily available programming resources
- Data consolidation of business metrics within custom reports and portals for management.

