



# FILENEXUS™ FOR UTILITIES & LOCAL GOVERNMENTS

The **FileNexus Enterprise Document Management System** gives organizations, both large and small, the ability to capture virtually any type of document from any source (i.e., paper records such as maps, drawings, manuals; electronic files such as host generated reports, client statement streams, emails, IVR recordings, etc.), index and compress them for secure archival and future recall—providing a single cohesive repository for all document management, workflow, archival and business continuity needs.

Here are some examples of how utilities & local governments use FileNexus in different parts of their operations including but not limited to Customer Service, Finance, Engineering, Human Resources & Purchasing:

*“The thing about FileNexus is that there are really no limitations, it can do so much. It has been very effective at saving us time, money and resources.”*

*David Whitehouse, Dir. Customer & Corporate Services  
Peterborough Utilities Group*

## ALL DEPARTMENTS

### **Capture, Organize & Archive Any Type of Record, From Any Source**

FileNexus provides a single cohesive repository to automatically capture all of your information from third-party applications, print streams, email, images, IVR recordings, PC files, Web Forms, Portals, you name it; and automatically index and organize these records just the way you like.

### **Automate Any Workflow Environment**

FileNexus allows you to automate any workflow, organizing pending tasks, providing personalized workflow action buttons and interface, based on individual user requirements.

### **Manage & Track All Aspects of Your Business**

Use FileNexus dashboards to track and report on business workflow outcomes, functions, staff productivity, etc. FileNexus can also automatically export key information for use in spread sheets or other third-party analytics applications.

### **Automatically Distribute & Allow Access To Data By Staff, Vendors, Or Clients**

Automatically capture, manage and securely distribute data electronically from any source – from host reports, to payment streams, to client statement runs. Distribute and allow access to information by way of portals, online bill presentment systems, digital mailboxes such as epost™ and so on, through integration to third-party application screens or the FileNexus Web Client.

### **Two-Way (Push-Pull) Integration With Third-Party Applications**

FileNexus provides for two-way integration with such third-party apps as CRM, Finance, Accounting, Administration, HR, etc. by way of web services, ActiveX, URL links, command line parameters (depending on the platform). FileNexus can update other applications as new records come in (for example, tell another system that a bill has been paid) or retrieve information from other systems to update the files it stores – either way, staff time doing data entry and keying errors are dramatically reduced.

### **Supports Disaster Recovery & Business Continuity Plans**

FileNexus ensures business continuity in the event of a disaster. It fits into whatever environment you have (physical, VM, cloud, multiple site, cluster, SAN, NAS).

### **Supports Compliance With Audit & Regulatory Requirements**

Automated audit log tracking of all record movements/versions/locations, protection of original records, retention scheduling, data encryption, advanced user security controls and many other security features are ready to go “out of the box”. Many FileNexus users consider FileNexus a cornerstone in helping them comply with regulatory requirements such as Sarbanes-Oxley, SEC, OSFI, FATCA, PIPEDA, PCI, Litigation Support, HIPPA, Audit and so on.

### **Eliminate Third-Party Costs For Storage, Hosting, E-Presentation, Media & so on**

Eliminate costs related to document production, storage, hosting fees, shredding, media, retention, etc.

### **Proven Performance**

Representative organizations employing millions of people now rely on FileNexus as their mission critical document archive, workflow and records management strategy.



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## CUSTOMER SERVICE

### **Securely Capture & Archive All Client Information – Everything From Everywhere**

All customer service records from any source including but not limited to applications, correspondence, emails, contracts, confirms, bill statements, payment records, service orders, phone logs, phone records, IVR recordings, complaint resolution process, etc. – everything from everywhere. No paper, no filing—a comprehensive client profile instantly available to the desktop at the click of a mouse.

### **Automate Workflow Processes from New Client Sign-Up To Account Close Out**

FileNexus can dramatically streamline the client management process by creating, capturing, indexing and securely archiving all client sign-up, account management and close out documents into one streamlined client workflow process—dramatically speeding up client support resolutions and rationalising operations.

### **Keep Your Client Information Secure**

Using appropriate security privileges and access controls, FileNexus can be configured to ensure managers, CSRs and individual clients view only the information they are entitled to see.

### **Seamless Integration With All Customer Service Systems**

Integrate FileNexus with your existing systems, including but not limited to CIS, CRM, Call Centre, Contact Management, IVR, etc. Access archived files directly from your host system screen with the click of a button. All client information from everywhere—instantly. All you require, right when you need it.

***“The integration of FileNexus with our CIS system is seamless and the implementation was the easiest system upgrade that we have accomplished.”***

*Jim Geary, Director of Customer Service  
The City of Clearwater, Florida*

### **Automatically Link Service Orders to Customer Files**

Batch scan service orders directly into FileNexus, automatically link to customer file and update service order status - saving valuable data entry time. If you use tablets for service orders, FileNexus can capture information automatically – no scanning required.

### **Two-Way (Push-Pull) Integration With Third-Party Applications Like *Call Before You Dig* Programs**

Owners of buried infrastructure receiving excavation locate requests from *Call before you dig* programs can have FileNexus automatically capture, index and archive the orders. During the capture process FileNexus will automatically convert the data file into an electronic locate form. If needed, event triggers can update existing service order systems with the new information. Using FileNexus workflow and reporting functions, utilities can easily manage, track and report on the entire process. This workflow solution helps to automate the locates process, track performance and improve overall efficiency.

### **Manage Customer Complaints Process**

Capture, index and archive customer complaints and automatically update your customer complaint status. Set auto generated alerts to notify a user if a pre specified amount of time has elapsed without a complaint being responded to. Annotate documents and track the customer complaints resolution process from start to finish.

### **Web Portal Access For Clients**

Automatically capture and store all client related information such as client newsletters, confirms, statements, notices, etc., and link it to your existing web portal. FileNexus can be set to automatically notify your clients when new information is available, and allow them to review all previous information.

### **FileNexus Web Forms For Clients & Staff**

FileNexus can easily generate custom web forms that capture, create and track documents from any web browser. Clients & staff can simply fill out a FileNexus Web Form for things like pre-authorized payments, application for service, landlord agreement and lawyers representation as part of the move-in move out process, removal of temporary or permanent service, service upgrades, etc.



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## FINANCE

### **Securely Capture & Archive All Financial Information – Everything From Everywhere**

All financial information from any source includes but is not limited to AR, AP, cheque streams, general ledger, monthly financial reports, client transactions, contracts, statements, financial notes, fixed assets, journal entries, cash receipts, billing journals, verifications, pre-authorized payments, tax documents, etc. Easily comply with regulatory requirements for document retention and significantly reduce the turnaround time on pulling and referencing reports and payment information. No paper, no filing – a comprehensive financial profile instantly available to the desktop at the click of a mouse.

***“I can’t readily quantify the paper and labor cost savings, except that it is the difference between night and day.”***

*Jeffrey B. Blume, Director of Finance  
The City of Ferguson, Missouri*

### **Automate The Entire Procure to Pay Process**

Create workflow processes to streamline and automate Accounts Payable procedures from purchase order issuance, approvals, orders, delivery, receipt of goods, billing, packing slips, expense invoices, vendor invoicing, automated capture of cleared cheques, etc. Instantly retrieve any or all invoices for variance analysis or audit purposes, allowing the tracking, streamlining and automation of the entire AP process.

### **Automate The Accounts Receivable Process**

Dramatically simplify the Accounts Receivable process from capture and e-notification of client statements, invoices, remittance stubs, call centre collections information through to final payment. FileNexus can even be set to automatically update host systems (for example, with payment notifications) – no manual data entry required.

***“No matter the departmental application, FileNexus provides a single, central and absolutely secure repository that manages all types of data and provides immediate access across departments. FileNexus eliminates the need to waste costs by printing documents and making unnecessary multiple copies; and wasting valuable time manually tracking processes and approvals.”***

*Howard Lyon, Chief Financial Officer  
Roanoke Gas Corporation*

### **Handle Payment Dispute Resolutions Efficiently**

Handle payment dispute resolutions in a quick and efficient manner, by having all relevant records available at the click of a button.

### **Automatically Capture, Index, Burst & Distribute Financial Reports**

Burst and distribute reports, such as the daily review and monthly financial reports, based on employee title, allowing electronic access and completion - even remotely.

### **Efficiently Comply With All Audit and Regulatory Requirements**

Auditors have immediate access to all the information they require. FileNexus can be set to automatically update previously archived records with new information (for example, updating a previously archived purchase order with the cheque number with which the vendor invoice was paid). All record movements are automatically tracked in the FileNexus audit log – creating relationships between related records. Use FileNexus to help you comply with regulatory requirements such as Sarbanes-Oxley, HIPAA, PIPEDA, PCI etc.

***“Loris is really responsive to the needs of utilities. They understand our problems and have solutions that work. It’s been a very positive experience working with them.”***

*Annette Kinney, Chief Financial Manager / Assistant Director  
Hillsdale BPU*



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## **Seamless Integration With Existing Financial Systems**

Integrate FileNexus directly into the workflow engine of your existing financial or accounting application – eliminating paper-based approvals and providing instant access to all archived documents directly from the host screen.

## **Web Portal Access For Vendors, Staff or Clients**

Use FileNexus to automatically capture, distribute and make available relevant financial information by way of web portals.

## **ENGINEERING**

### **Capture and Archive Virtually All Engineering Information**

Electronically capture, index and securely archive virtually all engineering information from any source, such as project documents, maps, work orders, images, CAD drawings, contractor notes, engineering files, spreadsheets, digital images, etc.

### **Link Entire Project File with All Associated Documents**

By keying in one unique index, FileNexus can automatically look up and populate index fields from an external spreadsheet or database – linking an entire project file, with all associated documents, into one cohesive file folder.

*“Our initial reason to implement FileNexus was to facilitate the filing and retrieval of our engineering drawings, but that was just the starting point in making our overall document retrieval much more efficient.”*

*John Mattinson, President  
Orillia Power Corporation*

### **Easily Add Supporting Documents**

FileNexus makes adding supporting documents, pictures, maps, etc. quick and easy for order completion and documentation.

### **Notes, Approvals & Interdepartmental Communications**

Notes and approvals can be added to all files to track their status and measure results. FileNexus lets you view completion notes at any time, and view additional information added by other departments.

### **Automate Virtually Any Workflow Requirement**

Automate and manage virtually any workflow application including work order processes.

*“Before FileNexus, we lacked visibility. We would issue a work order and we couldn’t know for certain where it went, who received it, or at what stage it was in. Now we know where a document is in the process at all times.”*

*Patrick Leung, Manager, Capital  
PowerStream Inc.*

### **Automatically Track & Manage File Versions**

When documents are stored in FileNexus, they can’t be amended, moved, or deleted without appropriate security permissions. Everything done in FileNexus is tracked by user, date, time and action. FileNexus stores and tracks all the originals and updated versions for full system auditability.

### **Seamless Integration With All Systems & Applications**

Integrate FileNexus with your existing systems and applications, including but not limited to GIS, and access archived files directly from host system screens.

### **Access Records From Anywhere**

All information from everywhere – instantly. Access records from the office, or on the road through the FileNexus Web Client or FileNexus Web Portal.



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## **Web Portal Access For Engineering Workgroups, Field Services, and Contractors**

Use FileNexus to automatically capture, distribute and make available relevant engineering information by way of FileNexus Web Portals. FileNexus can be set to automatically notify engineering workgroups, field services, and contractors when new information is available, and allow them to review all previous information.

## **FileNexus Web Forms For Staff, Engineering Workgroups, Field Services, and Contractors**

FileNexus can easily generate custom web forms that capture, create and track documents from any web browser. Staff and service providers can simply fill out a FileNexus Web Form for things like work orders, resource requests, escalations, supplies, storage retrieval, etc.

## **HUMAN RESOURCES**

### **Capture & Archive All HR Information**

Electronically capture, index and securely archive all HR information from sources such as resumés, offer letters, performance reviews, timesheets, benefits documents, payroll data, reprimands, policies and procedures, etc.

### **Track The Hiring Process To Completion**

Store and search through resumés, job applications, test results, references, etc. and track the hiring process through to completion.

*“What impresses me most about FileNexus is the software’s flexibility. The potential uses within the organization are vast, and Loris Technologies’ staff have provided valuable assistance in exploring some of the many possibilities.”*

*Andy Borthwick, Manager – Information Technology  
Kitchener-Wilmot Hydro Inc.*

### **Annual Reviews & Staff Management**

Automate the whole annual review and staff management process with workflow-based routing of review forms for management approvals, vacation requests, timesheets, event triggers, notifications, etc.

### **Send E-Notification Alerts for Certification/License Renewals**

Set alerts to generate and automatically distribute notifications for certification/license renewals, employee certifications, performance reviews, etc.

*“From this organization’s experience, the support at Loris is exceptional. The service, the professionalism are all top notch. My experience with our last three projects has exceeded our expectations.... Loris has provided the seamless integration that we needed.”*

*Garry Symons, Director of Corporate Services  
Entegrus*

### **Web Portal Access For Staff**

Allow employees secure access to their own information such as pay stubs, vacation requests, performance reviews, etc. through a self-serve portal.

### **Automatically Capture & Distribute HR Information**

Capture and securely distribute electronic data such as pay stubs, corporate announcements, manuals, health and safety data, etc.

### **FileNexus Web Forms For Staff & Management**

FileNexus can easily generate custom web forms that capture, create and track documents from any web browser. Staff and management can simply fill out a FileNexus Web Form for things like timesheets, vacation requests, performance assessments, annual reviews, and questionnaires for anything like *rate our service* assessments, AGM assessments, employee satisfaction, *rate your boss*, etc.



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## **PURCHASING**

### **Automatically Capture, Track and Manage All Purchasing Records**

FileNexus can automatically archive and distribute purchase orders as they are generated, and tie all relevant records together, from receiving slips to vendor invoices, into automated workflow cycles. (See Accounts Payable in Finance section above).

### **FileNexus Web Forms For Staff & Management**

FileNexus can easily generate custom web forms that capture, create and track documents from any web browser. Staff and Management can simply fill out a FileNexus Web Form for things like purchase requisitions, procurement applications, new vendor registration, etc.

*“We have nothing but good things to say about FileNexus. It runs smoothly with little or no down time. I’d be surprised if other utilities didn’t jump on board with it right away. It’s saved us a ton of money and time – it works well!”*

*Shannon Brown, Metering / IT Manager  
Innisfil Hydro*

## **WHAT’S YOUR IDEA?**

Do you need to automate a workflow process? Contact us today.

### **For More Information**

To learn more about how FileNexus can streamline your operations and improve your business efficiency, please contact:

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Visit [www.loristech.com](http://www.loristech.com) for more details on how other utilities and local governments use FileNexus in their operations. You will also find other client profiles and more on FileNexus and Loris Technologies Inc.