

Customer documents flow easily with Invu solution

An electronic document management (eDM) solution enables Jersey Water, a water company in the United Kingdom, to upgrade from a paper-based filing system to a flexible and more secure customer content management system.

Jersey Water collects, stores, and treats raw water – converting it to high quality drinking water before distributing to its customers on Jersey Island. It has to collect, record, and store letters, statements, invoices, and other sensitive customer documents for more than 30,000 customers. Because of this, the company was forced to file large amounts of paper records locally in its main office or store its hardcopy documents in an archive. Given the space required to store an estimated 200,000 paper-based customer documents, the company had a strong business case for an electronic document management (eDM) solution.

Jersey Water previously used an extension of its core billing solution as an eDM solution, as it had dual integration with its billing and customer content management system, HiAffinity. When looking to adopt a new eDM, Jersey Water sought a solution that could not only outperform the functions of its existing system, but could also integrate with its core business solutions.

With limited ground water resources, Jersey is almost entirely reliant on surface water for its mains water supply. For Jersey Water, which supplies drinking water to more than 90 percent

of the island's population, this requires a significant investment of resources and comprehensive management of reservoirs; treatment works; and pipe networks at 20 sites across the island. Serving more than 30,000 customers placed a significant strain on the paper-based filing system, not just in the need for physical space, but also to the incumbent eDM – which recorded any paper documents in a TIFF file format that made searching for customer information very difficult.

Jersey Water's Business Systems and Project Manager David Bloomfield explained the company's synergy between its customer content management system – HiAffinity – and Invu. "When dealing with customer enquiries our staff need(s) to access individual customer data instantly, within just a few clicks of the mouse," he said. "Searching on a unique identifier in HiAffinity – such as customer number or property number – automatically initiates a search within Invu, and instantly provides the customer service agent with all documents related to that individual customer. This has brought us significant time savings and increased the quality of service we provide to our customers."

The flexibility provided by the Invu eDM

solution, provided by local Invu partner Logicalis Offshore, enables Jersey Water to make savings on employee time and on physical space. With seamless integration with its core business system, employees are now able to process documents of all file types.

"We can now load various documents into Invu in a number of different ways, including scanning them in or saving them directly from a desktop," Bloomfield said.

The eDM solution added an extra layer of security when storing private customer data, while also providing full audit trail capabilities. As Bloomfield explained, "The added security benefits we receive from the Invu eDM far outweigh those than our previous paper-based systems. The Invu solution gives us the assurance that access to customer information remains fully controlled, with visibility of who is accessing it – meaning, that it is kept safe and secure within the solution."

The workflow is operating so well that Jersey Water is planning to deploy the Invu Workflow module to more business areas to help streamline and automate other critical processes. The implementation and migration to the Invu solution began in 2012, and is now 100 percent



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complete. Beginning in 2012 and up until now, Jersey Water has been working with Invu to successfully migrate existing TIFF documents and capture any additional paper-based documents stored in filing cabinets and in the archive. Jersey Water is also looking to explore other Invu solutions to achieve further efficiency savings.

"In addition to Invu eDM, we have implemented one workflow that allows us to automatically take copies of customer bills and invoices and pull them into Invu every day," Bloomfield said. "This benefits us from an audit perspective, as it means we are able to see where bills and invoices are at any stage of the process."

