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# Cleco Manages Engineering Workflows and Documents with Idox's FusionLive®

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**Randy Steinhoff**
Supervisor, Project Management Support
Cleco

**Challenge:**
Distribution of reports and the review of contractor submittals

Cleco is a regulated utility company, serving approximately 288,000 customers through its retail business, and supplies wholesale power in Louisiana and Mississippi. Founded in 1935, the company employs over 1,200 people across the state of Louisiana.

The busy engineering team that supports the day-to-day operations at Cleco manages multiple projects across the business. The distribution of reports and the review of contractor submittals is a mission-critical process.

To proactively manage its own organizational growth, in early 2017 Cleco reviewed its workflows for document review and approval and concluded that its existing system was no longer fully meeting its needs.

With a compliance-driven initiative already underway to implement SAP and Oracle Primavera for project management to formalize the numbering of documents, the Project and Governance Controls Department in Cleco saw the perfect opportunity to bring itself up-to-date.

**Solution:**
A secure cloud-based project collaboration solution

Looking for an easily accessible solution with tight access control as well as workflows with structured business processes, Cleco reviewed several cloud-based document control systems. It turned to its long-term technology partner, Idox.

Randy Steinhoff, Supervisor, Project Management Support at Cleco explains, "In our experience Idox has excellent customer and user support. The way the solution provides support for unlimited users also makes it very convenient for an owner that has multiple jobs in progress with different contractors."

Utilising the training and consultancy services at Idox, Cleco rolled out FusionLive®, a secure cloud-based project collaboration solution for owner operators and engineering procurement and construction contractors (EPCs).



The solution from Idox extends the business processes of document management systems without the risk of exposing internal systems and networks. It improves, supports and simplifies project collaboration and document management for construction and engineering projects of all sizes.

The business intelligence dashboard provides real-time data to help managers make informed business decisions, and document controllers to reduce bottlenecks in the document control processes.

"During the transition to FusionLive® we encountered clients who were hesitant and pushed back when they were told that we required them to use the solution to collaborate on engineering projects," continues Steinhoff. "They had their own FTP (file transfer protocol) sites and didn't see the value in using our system. They quickly realised that FusionLive® is so much more than an FTP site. The version control capabilities combined with the two-way accountability features made them believers. There have been many cases where our clients referenced activity due dates and unanswered requests for information (RFIs) to keep us informed and on schedule (instead of us using FusionLive® to keep clients on schedule). The bottom line is once a company gets its clients on board, they will realise benefits that they never really considered beforehand."

**Outcome:**

FusionLive® exceeds Cleco's expectations

The Idox solution has greatly enhanced Cleco's processes for approvals, RFIs and transmittals as well as collaboration with vendors. In fact, the Company asserts that FusionLive® is very critical to its business operations. As Steinhoff concludes, "Idox's customer service and product support has exceeded our expectations. The development team is always interested in receiving our feedback and it works hard to incorporate that feedback into software updates."

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