Neptune® 360™

Advanced

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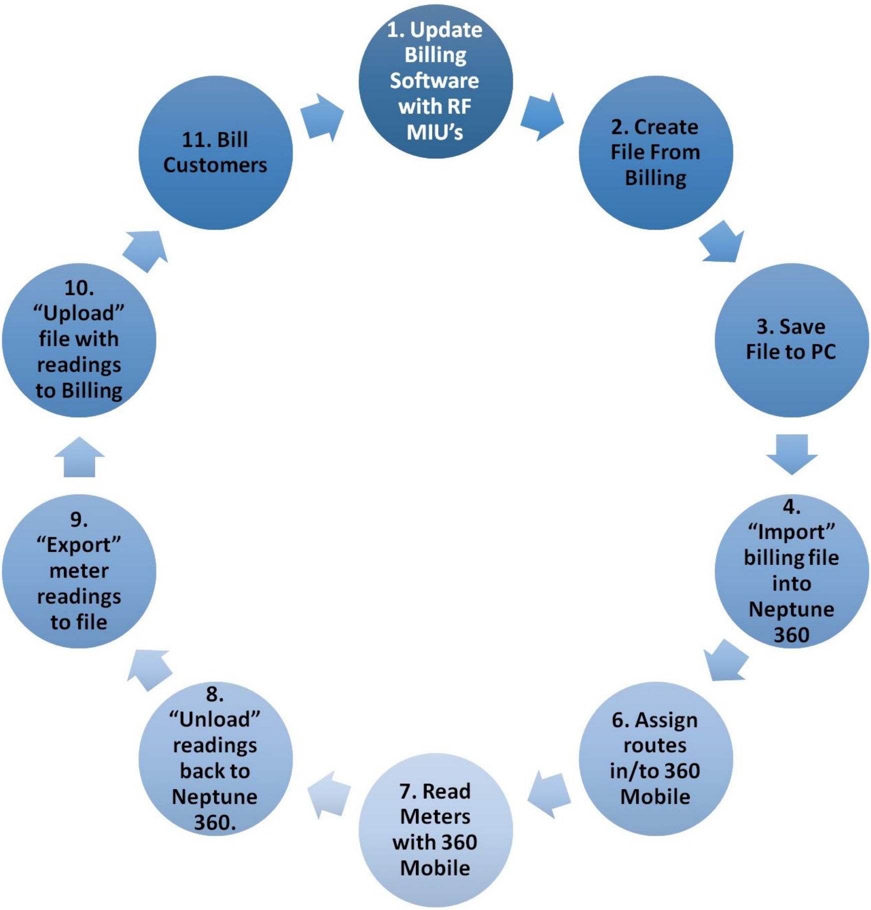
Reading Cycle



Welcome Page

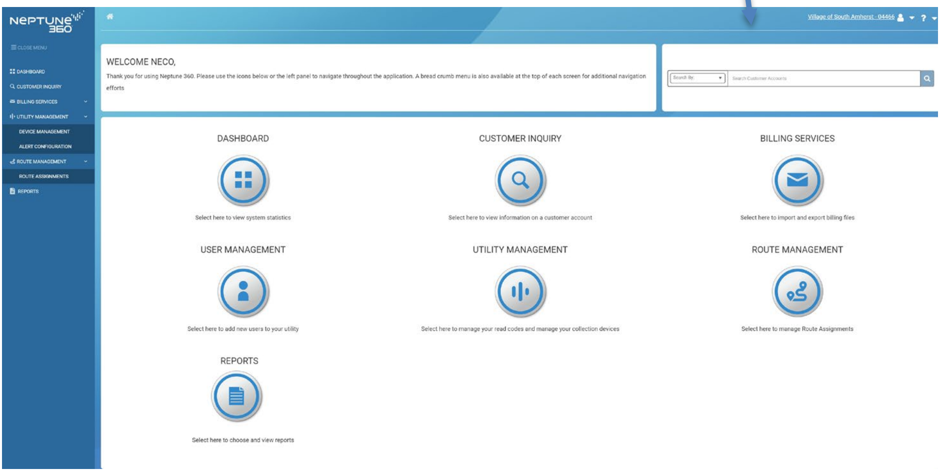
Once you have successfully logged in the system, you land on the Welcome Page.

This pamphlet covers the six major functions you can perform:

- Dashboard Graphs
- Customer Inquiry
- Billing Services
- User Management
- Utility Management
- Route Management

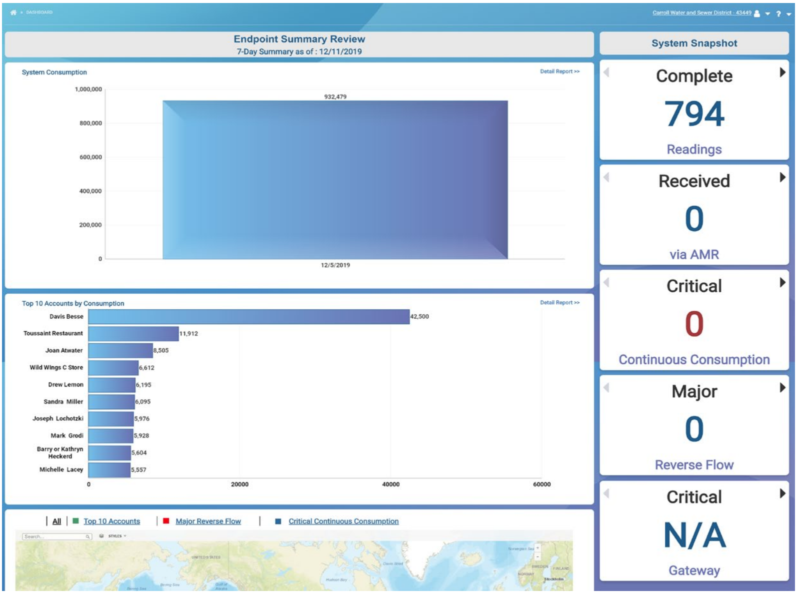
Customer Inquiry Shortcut

- ***Welcome Page***



Dashboard

- ***Dashboard***
    1. Access the *Dashboard* screen from left navigation and/or the main content area of the landing screen and view the dashboard.
    2. You can view data based on the viewing parameters chosen. This includes all Key Performance Indicator (KPI) metrics along with GIS Mapping component.
        a. To access the reports for **Endpoint Summary**, click on **Detail Report >>** and report should display.
        b. To access the reports for **System Snapshot**, click on the number of affected accounts within the KPI and report should display.

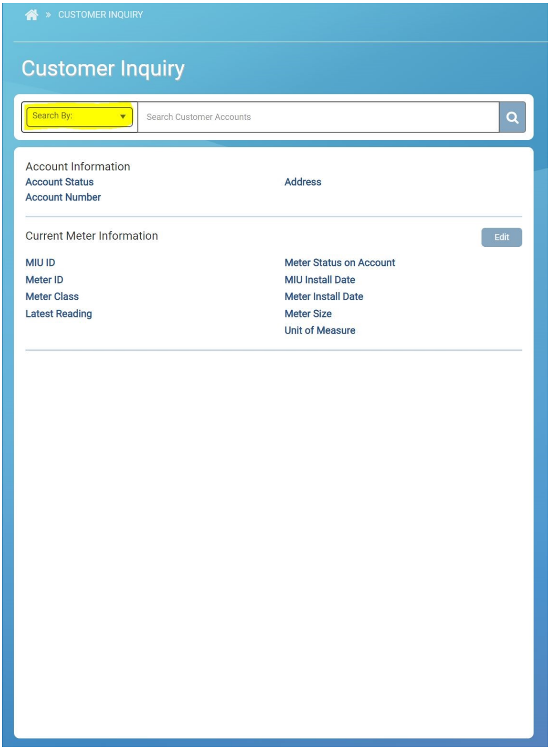


Customer Inquiry

- ***Customer Inquiry***

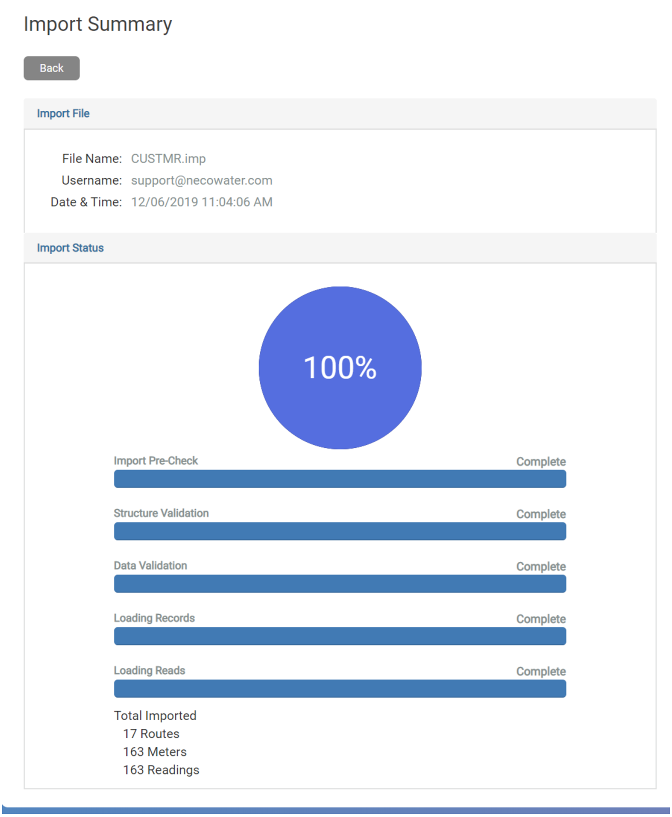
  To search for individual accounts

  1. Select the **Search by** option (Account Number, Customer Number, Meter ID/MIU ID, or Address) and enter value to be searched for in **Search Customer Accounts** bar
  2. Select an account from the search results.
  3. *Press* ***OK****, the a*ccount information then displays



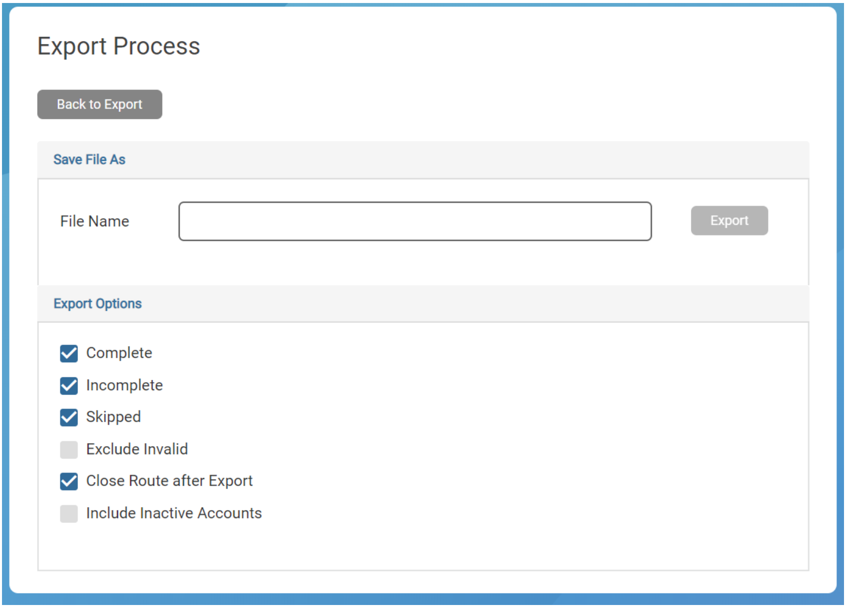
Billing Services

- ***Billing Services***
  1. ***Import*** **-** User can import billing files received from the CIS.
     1. Access the *Import Files* screen from left navigation and/or the main content area of the landing screen.
     2. Select **Import**.
     3. **Browse** to the file.
     4. Select **Import**.
     5. System will perform import.



Billing Services (cont.')

2. ***Export*** - User can export files from Neptune 360 to import into the CIS for all required reading data.
    1. Access the *Export Files* screen from left navigation.
    2. Select route(s) to export.
    3. Enter **File Name** for the export file.
    4. Set Export Options.
    5. Select **Export**.
    6. System will perform export.



User Management

- ***User Management***

Only users with the Utility Administrator role have access to the *User Management* module from the Welcome Page. This allows adding new users, editing existing users, sending password resets, and deactivation of users from the system.

New users and password resets will generate an email to the email address entered/listed for the user. The user must then follow the link to set their password.

Password requirements

Minimum 8 characters, UPPER and lower case letters and a number or symbol May not contain: /<>|=+ or blank spaces*

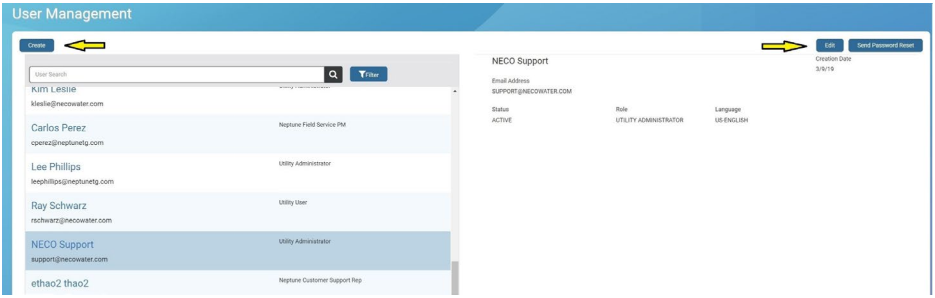
User Roles:

	Utility Administrator	Utility Reader	Utility Read Only Access	Utility User
Dashboard	✓	✔	✔	✓
Customer Inquiry	✓		✔	✓
Billing Services	✓			✔
User Management	✓			
Route Management	✓	✔		
Handheld Management	✓	✔		✔
Reports	✓			✓

✓ Full access with editing capabilites

✔ Limited access with limited editing capabilites

User Management (cont.’)



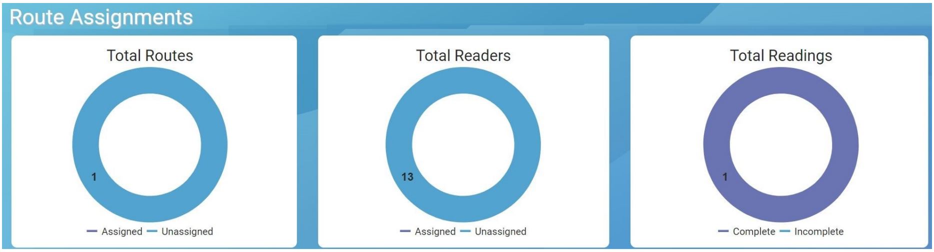
1. Adding new users
    1. Select the **Create** button – *upper left above list of current users*
    2. Fill in all fields – all are required
    3. Select **Save** – *upper right corner*
2. Manage users
    1. Search for and select the user to be managed.
    2. Select ***Edit*** – *upper right corner*
    3. Edit the user information, including status for deactivating.
    4. Select **Save**.

3. Password resets
    1. Search for and select the user to reset.
    2. Select **Send Password Reset** – *upper right corner*

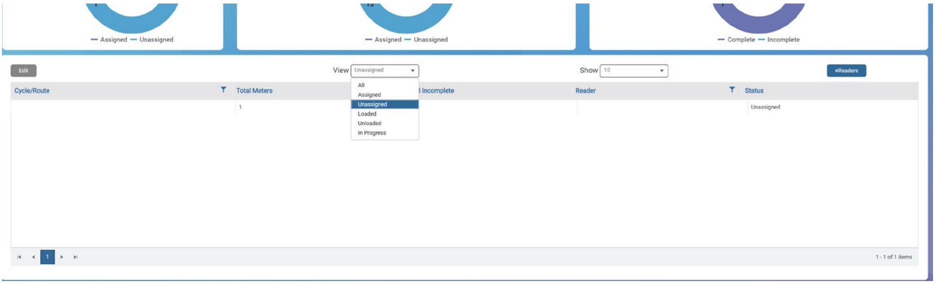
Route Management

- **Route Management**

Route Assignment KPIs



- Total Routes - number of routes Assigned vs Unassigned.
- Total Readers - readers with routes assigned vs readers with no assignments.
- Total Readings - number of orders complete vs incomplete.

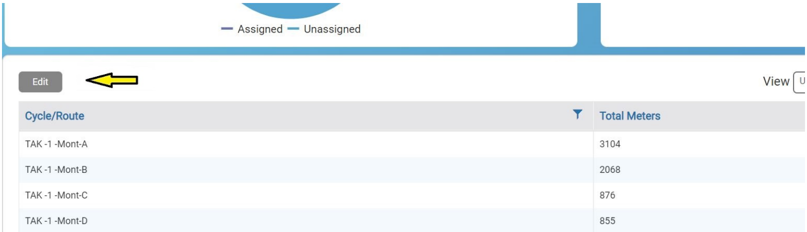


To **Filter** routes, select a desired **Status** from the **View** dropdown options and routes matching the selected status will be displayed.

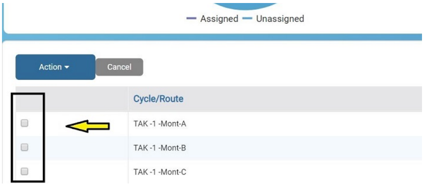
Route Assignment

- **Assign/Unassign** routes manually

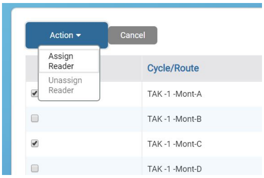
1. Select the **Edit** button (upper left)



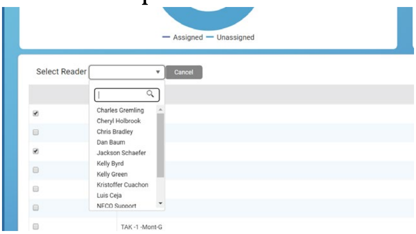
2. Select the route(s) from the list by checking the box on the left next to it/them



3. Select the Action button (upper left) and choose to assign or unassign



4. Select a reader from the dropdown list

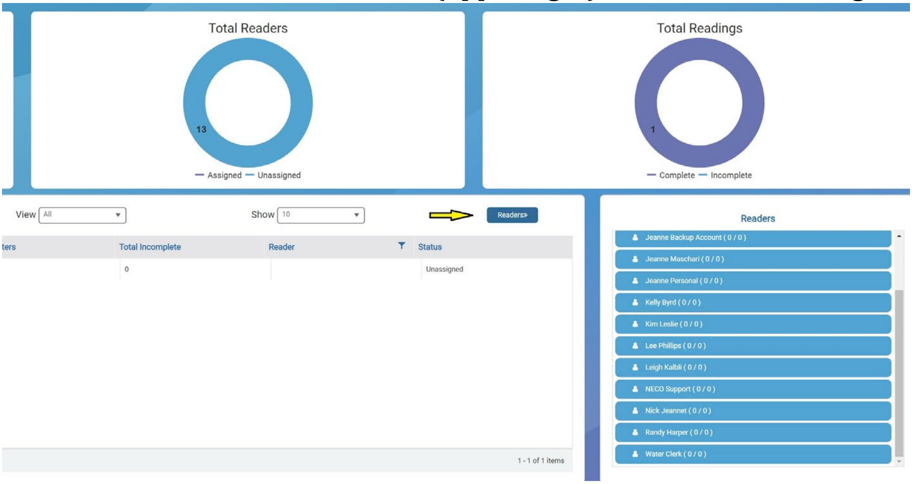


5. Press Save

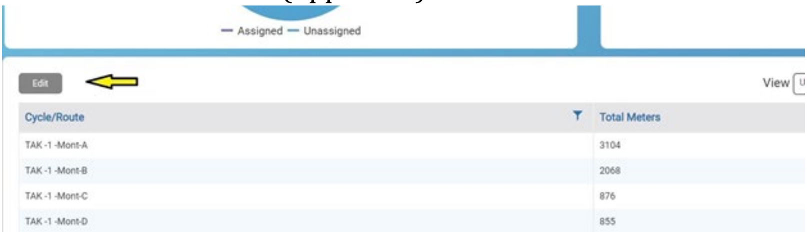
Route Drag and Drop

- **Assign** routes Drag and Drop method

    1. Select the **Readers** button (upper right) so the list is showing



2. Select the **Edit** button (upper left)



3. Cursor will look like a hand, left mouse click on any route and drag it to a name in the list of readers

4. Press Save

Unassigning routes must be done manually

Notes

Notes