



101 Ways to Use Perceptive Content

Cut costs and create efficiencies enterprise-wide

Accounts Payable

Remote Office Invoice Approval

Manage the processing of invoices that are scanned, linked, indexed and approved by managers and users across all departments with Perceptive Content solutions integrated with your existing financial system. Invoice approvals can also be completed by users from any location on their tablet or mobile phone.

Distributed Capture of Invoices

Scan invoices and purchase orders into the Perceptive Content document repository using multi-function printers in multiple remote locations.

Faxed Expense Reports with Bar Codes

Process faxed expense reports, related invoices and receipts from hundreds of office locations nationwide. Use bar-code recognition to automatically index expense reports and route them for approval.

GL Coding Assistance

Complete data entry of invoices into a Perceptive Content e-form and auto-route them through the workflow process. Once approved, Perceptive Content creates a transaction within the AP application environment.

AP Data Extraction

Manage invoices scanned from dozens of locations; automatically gather information using capture and route to the corporate office for processing.

Proof of Delivery Signature Verification

Collect customer signatures on invoices at the time of delivery, then scan the invoices and automatically verify signatures.

Credit Card Transaction Tracking

Capture employee expense documents (credit card statements, receipts, acceptance and inspection forms) via email using a bar-coded cover sheet and automatically track transactions.

Travel and Expense Capture and Approvals

Use mobile capture capabilities to record receipts on the go. Managers can also approve expense reports from mobile devices for quick payment and reimbursement.

Journal Entry Capture

Scan journal entries into the Perceptive Content repository so remote users can retrieve relevant information.

Automatic Routing of Invoices

Automatically route any invoice over a certain amount to the correct managers for approval.

Capture Check Runs

Scan and link vendor invoices at individual local branches and route them forward, automatically directing them to the appropriate approver at headquarters to prepare for daily high-volume check runs.

Hyland®

Deductions

Use Perceptive Content to dispute or accept documented deductions from shipment, based on undelivered items, and approve or reject accounts receivable bills.

Customer Project Expenses

Link employee-submitted expense receipts to a project number within your existing expense software application. Re-index and collate expense documents with the related invoice then print, email or fax the packet to a customer.

Check Matching

View a check and a list of all related invoices on the same screen using Perceptive Content's related document feature.

AR Payment Receipt

Import check images for subscription payments and index them with a text file so customer service representatives can view the images from customer account records.

AP EDI Invoice Approval

Convert EDI 810 files into an indexed TIFF image and route the invoice through the approval process.

Eliminating Courier Expense

Capture and manage documents related to a specific transaction and send the packet electronically to its destination instead of using expensive and time-consuming couriers.

Supplier Discounts

Improve profitability by accelerating invoice approvals to take advantage of time-sensitive supplier discounts.

Customer Service

Business Card Automation

Use capture capabilities to extract information from business cards and populate the data into your company's CRM.

Automatic Subscription Renewal

Run scripts periodically within Perceptive Content to determine subscription expiration dates. Automatically send emails to customers and append all correspondence to their records.

Credit Applications

Scan customer credit applications and all pertinent documents, including reference letters and payment information.

Customer Contracts

Provide customers secure "view only" access to legal contracts through a secure web portal using Perceptive Content web services.

Support Ticket Automation

Promptly route customer support information to appropriate personnel and employ alarm features to ensure an efficient and effective support response.

Order Status Notification

Instantly access order documentation and provide immediate answers to customer inquiries.

Return Approvals

Route merchandise return requests to approving personnel and automatically generate a return merchandise authorization to notify the customer.

Idea Management

Capture customer-submitted ideas for product enhancements and automatically route them to the appropriate evaluators.

Signature Card Scanning

Scan customer signature cards for easy retrieval by the bank staff when the customer makes a deposit.

Customer Call Centers

Use Perceptive Content to manage the many documents — including correspondence, support tickets and other CRM records — required in the call center.

Correspondence Management

Store and search all correspondence sent to and received from customers, including email, fax, postal mail and phone conversation records.

Support Product Documentation

Perform keyword searches of all products within the Perceptive Content document repository to answer customer product questions quickly and efficiently.

Fund-Raising

Access donor documentation instantly while traveling on fundraising trips.

Human Resources

Mobile Time Sheets

Enter employee and equipment time sheets into a form using a laptop, tablet or phone in the field, then submit and route time sheets for approval.

Benefit Forms

Scan all employee enrollment forms into Perceptive Content, so when questions arise or verification is needed, the form is easily accessible from the user's screen.

Resume Search

Perform keyword searches on captured resumes, keying on past candidates who are a fit for new positions.

Offer Letter Approvals

Review candidate offer letters for approval using budgeted salary parameters for guidance, holding recruiters and managers accountable to the budget.

Performance Evaluations

Complete annual performance evaluations using an online form, then capture and auto-index with Perceptive Content.

Pension Archiving

Using an employee's ID, automatically locate all documents associated with individual retirees or pensions and export them as a multipage TIFF on a CD.

Name Changes

Use Perceptive Content to read the text file submitted with an employee name change, then update all related documents and notify the user that name change is complete.

Electronic Personnel Files

Digitally capture new hire documents, adding the documents to projects and routing them to the appropriate people for review, notification and additional processing.

Interview Automation

Route initial employee application forms along with other supporting documents to the interview panel for review and selection, adding them to the employee file once hired.

HR Process Compliance

Enforce workflow processes to assure that remote offices handle documents in a consistent manner.

Employee Records

Capture employee email communications pertaining to performance directly into Perceptive Content for record keeping.

Employee Portal

Improve the efficiency and timeliness of employee information sharing by integrating Perceptive Content with the employee self-service portal.

Centralizing HR

Capture and link forms and employee files from multiple facilities via MFP, scanner, fax, email, OCR and other technologies.

Exit Surveys

Capture and manage exit surveys from people that leave your organization to track comments and trends.

Company Manuals

Capture policy and procedure documents, giving employees the ability to view documents instantly from the company portal.

Asset Management

Use digital signatures to enable employees to acknowledge receipt of equipment (such as computers, laptops and mobile devices).

Tuition Reimbursement

Track documents, such as applications, reference letters, grades and payouts, for tuition reimbursement in three categories with separate payout amounts.

Onboarding

Manage multiple documents as a packet and link images of documents, such as direct deposit authorizations, insurance enrollment forms and confidentiality agreements, to personnel files in an HR system.

Credentialing

Store and access certification documents, education awards and licensure information to manage CME hours.

Legal and Compliance

Compliance with Document Records Retention Guidelines

Support compliance with document requirements for government regulations and other industry-related standards with Perceptive Content Retention Policy Manager.

Tax and Treasury

Scan and archive company tax information for audit purposes.

IT Contracts

Capture and link all of your IT contracts documentation for secure storage and easy retrieval.

Legal Department

Use Perceptive Content as a stand-alone repository to store and track all legal documents.

Sensitive Corporate Documents

Manage documents for C-level and upper management viewing only using authorization and security measures, including password protection.

Enterprise Search

Search the contracts repository for any word or combination of words to locate exact documents quickly.

Compliance Support

Scan and securely store documents related to relevant compliance initiatives, such as HIPAA, Sarbanes Oxley and FERPA.

Audit Support

Use automated workflow queues to handle internal and external audits, giving secure viewing access to auditors who don't have existing authorization.

Missing Document Automation

Make use of Perceptive Content's alarms to alert appropriate staff members when important documents are missing from records.

Lawsuit Management

Store and access all documents related to any legal action in Perceptive Content's secure repository.

Contract Management

Create, manage and electronically sign contracts using Perceptive Content eAuthorize and content management technology.

Sales

Season Ticket Application Management

Process all documents and payments related to athletic events.

Outgoing Proposal Management

Manage sales proposals through various levels of approvals and processing.

Prospect Email Automation

Receive email from prospects and automatically attach them to the prospect's record in the company CRM.

Business Plan Development

Use version control to revise business plan documents within Microsoft Office applications and approve them with digital signatures.

Concession Approval Process

Forward pricing incentives to approving managers through workflow.

Historical Customer Data

Make order histories, paid and outstanding invoices and shipping information available to the sales team through a secure web browser.

Loss Prevention

Enable authorized system users in HR, loss prevention and payroll to access important information anytime with just a click.

Branch Office Empowerment

Empower local branches with view-only document access so they can locate invoices themselves and resolve issues.

Global Connections

Capture documents in one office and route them immediately to offices in other states or countries for approval and payment.

Facilities Management

Space Savings

Electronically storing documents eliminates wall-to-wall file cabinets and enables the storage area to be converted into office space.

Building Documentation

Store and retrieve all documentation about your building, fixtures, invoices and appliances to aid in inventory management.

Building Security

Capture documents related to all building security issues, evacuation plans, employee ID/badge systems and alarm code procedures.

Fire Inspections

Easily retrieve needed fire inspection documents to ensure all violations have been addressed.

Manufacturing

Engineer Drawings

Store engineering documents and drawings, control access and use automated workflow to route as needed for reviews.

Quality Control

Scan ISO documents for machinery or parts specifications and link them to the related record in a software application.

MSDS Management

Electronically capture, store and access all MSDS documents in a searchable repository for quick reference in case of emergency.

Healthcare

Nursing Licenses

Capture all nursing permits, applications and licenses and link them to state nursing applications for timely renewals.

PACS Integration

Scan and convert documents, making them available for radiologists to view alongside medical images.

Patient Wound Care

Use mobile device capture capabilities to quickly record wound and medical images, and link to patient records.

Fetal Heart and EKG Monitors

Capture printouts from fetal heart monitors and EKGs and link them to medical records for easy retrieval at the point of care.

Education

Transcript Processing

Capture student transcript documents and automatically extract all important student, class and grade information that can be shared with a student information system.

EP Process

Capture and manage the documents that surround individualized education programs in concert with student information systems, providing secure access to authorized school employees.

Sports Injury Reporting

Keep track of the physical well-being of student athletes, including health records, training reports, dietary needs and performance metrics.

Permission Slip Management

Image and store all permission slips for K-12 school field trips to ensure accurate record of parent authorization.

Government

Public Safety and Courts

Scan in all violations, such as traffic tickets and citations, to speed the processing of legal infractions.

Voter Registration

Manage all documents related to proper registration of voters to ensure secure, verifiable records.

Municipal Courts

Capture court documents and enable the judge to place a digital stamp or signature on documents in real time during court proceedings.

Police Department

Enable officers to manage traffic tickets in real time while in the field.

Boating Permits

Capture and process boating permit applications and registrations for quick turnaround, and provide law enforcement officials with online access to information if needed.

Additional Uses Cases

Library Services

Provide authorized personnel with a quick content search of important documents, articles and newspapers.

Remote Mail

Capture hard copy mail into the Perceptive Content repository and allow traveling or remote employees to access and view it.

Meeting Minutes

Capture, route and store corporate or client meeting minutes and easily share them with team members.

Disaster Recovery

Store critical business documents electronically and safeguard vital information in the event of natural disaster or fire.

Corporate Identity

Manage and secure the most up-to-date company logos, artwork, messaging and other documents for use organization-wide.

Historical Records

Scan old pictures, mapping documents, plans from plotters, newsprint and other valuable documents for more secure archival.

Inventory Report Generation and Storage

Capture high-volume inventory reports for various locations and distribute for verification, allowing users to search the reports by line item detail.

Historical Document Preservation

Scan and store historic documents so researchers can access and study their contents without damaging the original pieces.

Integration with MFP

Integrate Perceptive Content with MFPs throughout the enterprise to initiate document imaging and workflow directly from the devices.

Construction Projects

Capture all construction documents and enable the project manager to view all documents related to a specific job.

Research

Use Perceptive Content as a digital repository for housing all research documents as employees work on one or several projects.

Photo Capture

Use mobile photo capture to record and log pictures related to facilities management and maintenance, insurance property claims or adjustment records, and other asset management records.

Insurance Claims Processing

Route claims documents to the claims adjuster in the field who accesses the documents using Perceptive Content, populates an accident report e-form and routes it back for processing.