



CASE STUDY UTILITIES

Ocean County Utilities Authority

Accounts Payable
Accounts Receivable
Purchasing

In New Jersey's Ocean and Southern Monmouth Counties, when the water used goes down the drain and out of mind, that's when it becomes the business of the Ocean County Utilities Authority. Eighty million gallons of water pass through the three wastewater treatment facilities operated by the OCUA each day. Formed to protect and preserve the Barnegat Bay environment for current and future generations, the OCUA has been honored with more than 53 awards for excellence from the National Association of Clean Water Agencies (NACWA) since 1983.

One area OCUA wanted to improve internally was accounts payable, where three accounts payable clerks process up to 600 vouchers each month. These processes were frequently slowed by a paper-based approval process, an ineffective document imaging archival system, and software and hardware issues. The Information Services team looked for an easy-to-use document management and workflow solution that would create efficiencies while working in concert with their existing SAP accounting system. After evaluating several vendors, OCUA selected Perceptive Software.

"Perceptive is the best solution for us because it is very end-user friendly, and it is easy to configure and install with our SAP system," says Randy Martin, OCUA systems administrator.

Seamless Integration With SAP

OCUA implemented Perceptive Content in the purchasing, accounts payable and accounts receivable departments. The project team worked with Perceptive Software to build the solution, paving the way for a smooth on-site implementation. Perceptive Content integrates seamlessly with SAP using Perceptive Software's patented LearnMode™ technology, allowing users to link documents to SAP records with a single click and retrieve documents directly from SAP — all without complex programming.

"Perceptive is so easy to use that there was a low impact on end users, but a big impact on our business process. It was immediately perceived by everyone as an improvement," says David Stupar, OCUA director of IT.

Streamlining Cumbersome Processes

Before using Perceptive Content, paper vouchers were transported for approval, signed and sent back to accounting for processing. The documents were then scanned into the old imaging system, which required employees to manually key in index values for each document. The duplicate data entry made the process time-consuming and error-prone, causing a six-month backlog.

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Randy Martin
Systems Administrator
Ocean County Utilities Authority

To leave this system fully behind them, OCUA converted the 60,000 documents in its old system into Perceptive Content, a process that took just four hours. Within the first six months of use, the staff worked its way through the backlog and has been caught up ever since.

Now employees scan vouchers into Perceptive Content and route them through Workflow to gain approvals. When the approved voucher is routed to AP, clerks create the transaction within SAP from the imaged document and link the documents to the corresponding SAP record with one click, eliminating the need to manually key in documents and reducing the risk of errors. The seamless connection between with SAP allows all documents related to an SAP record to be available instantly from SAP with a single click.

“Before using Perceptive, employees made copies of everything before sending it to AP because it was a couple of months before they had access to the documents again,” says Heather Pushkal, OCUA systems analyst. “Now that all vouchers are scanned in up front, so all end users do is point and click from SAP and they see everything they need immediately.”

Shaving Hours Off the Approval Cycle

Gathering final approval signatures on vouchers used to be a painstaking process that wasted hours, but using Perceptive Content to electronically sign approval simplifies this task.

“Using Perceptive to approve vouchers saves about 16 hours per month for our executive director and eight hours for the executive assistant each month,” says Pushkal. “You can imagine how happy they are with Perceptive.”

Likewise, the time required to approve vouchers has been drastically reduced, as what could have taken weeks under a paper system can be completed in days or hours.

“We estimate that using Perceptive Content saves us 40 hours per month in approval time, and about 40 hours a month in scanning time,” Pushkal adds. “We eliminated the need for overtime as well.”

Part of these time savings come from workflow efficiencies created by electronically routing documents. Using Perceptive Workflow, managers can easily keep track of documents in their queues and take action quickly, without leaving their desks. Documents stored in the central Perceptive Content repository are visible instantly to any authorized user, regardless of whose queue the document is in or what its status is. Instant anytime, anywhere access to documents eliminates the need to make extra copies, saving OCUA more than 2,000 photocopies per month.

Maximizing the Benefits

Seeing the success of Perceptive Content in accounting and purchasing sparked other ideas for gaining efficiencies. OCUA is now implementing Perceptive Interact™ for ESRI in the engineering department, linking engineering records to features within its ESRI Geographic Information System. Once implemented, this will provide instant access and easy workflow for collecting field information on manholes.

OCUA is looking forward to expanding Perceptive Software into more areas, such as human resources, bank statement reconciliation, and EPA regulatory and compliance documents.

“Perceptive is the star of our IT fleet right now,” says Stupar. “It’s easy for us to maintain, and we are getting great feedback from our users.”

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Quick Stats

- Location: Ocean and Southern Monmouth Counties, New Jersey
- Population served: 36 municipalities in Eastern New Jersey
- Departments using Perceptive Content: accounts payable, accounts receivable, purchasing
- Integration: SAP

The Challenges

- ▶ Accounts payable processes are slowed by inefficient paper-based workflow
- ▶ Existing archival document imaging system is manual and time-consuming
- ▶ Document management solution must integrate with SAP
- ▶ To aid adoption and speed processes, solution must be easy to use

The Results

- ▶ Perceptive Workflow accelerates approval processes
- ▶ Integration with existing SAP system eliminates duplicate data entry and ensures consistency
- ▶ Non-programmatic integration with SAP system is quick and easy
- ▶ Ease of use and resulting time savings make Perceptive popular with users

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