

TELLIANT™
Intelligent Software. Delivered.

Telliant Systems
3180 North Point Pkwy
Alpharetta, GA 30005

678-892-2800
www.telliant.com

Case Study

From Capture to Conversation: Semantic Search and AI Agents in Document Management

The Client

The client is a business technology provider that helps organizations streamline operations, improve productivity, and simplify information management.

Its document management ecosystem spans a desktop platform for document capture and retrieval, a mobile app for on-the-go capture, and an integrated AI chatbot.

As the focus shifts from managing documents to making information intelligent, the client is evolving the ecosystem toward AI agents that automate tasks and streamline workflows, with a vision of simpler access and less manual effort.

The Challenge

The client set out to evolve its document management platform beyond storage: improving capture, retrieval, and form-heavy workflows while making information easier to access through conversational AI and AI agents that reduce manual effort.

- **Capture and indexing** required accurate, searchable organization of rapidly growing digital content.
- **Search and retrieval** across large document volumes slowed access to the right information.
- **Manual data entry** in forms and documents was repetitive and consumed valuable staff effort.
- **Document-driven workflows** involved repetitive steps and avoidable delays.
- **Intuitive access** called for conversational AI and agents that act on existing information.

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Technology Environment

Telliant worked with the client to identify/create the most suitable tech-stack for the project to include:

LANGUAGES

- C#, .NET 10, .NET MAUI
- Blazor, XAML

PLATFORM

- Microsoft SQL Server

INTEGRATION

- Microsoft.Extensions.AI
- OpenAI SDK, Ollama
- ONNX Runtime GenAI
- Git, bUnit testing

About Us

Telliant Systems offers a diverse selection of custom software product development services, such as product strategy, software design, application development, QA/Testing, and application management services. Expert teams are available to develop web, enterprise, and mobile applications, including iOS and Android development.

Solution Highlights

Telliant enhanced the platform with mobile capture, forms filling, workflow automation, and conversational AI, with AI agent development now underway as the next evolutionary step.

- **Document Management Upgrades:** Improved capture, indexing, search, and forms filling.
- **Mobile Capture App:** Android and iOS document capture beyond the desktop.
- **Conversational AI Chatbot:** Natural-language access using configurable AI models.
- **AI Agent Implementation:** Underway to auto-populate forms from existing data.

Insights and Results

The platform now helps users manage, search, and process documents more efficiently across desktop and mobile, with less manual effort.

- **Better capture and indexing** makes documents easier to organize and retrieve.
- **Faster search and retrieval** helps users locate the right information efficiently.
- **Simplified form filling** reuses existing information to reduce manual data entry.
- **Streamlined workflows** with fewer manual steps and more efficient processes.
- **Chatbot assistance** gives conversational access to answers and document tasks.
- **AI-ready mobile foundation** supports iOS, configurable models, and AI agents.

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