

# Case Study

## Isos Housing

*PSI:Capture helps Housing Association track and manage invoices*

### The Company

Isos Housing Group is a charitable, not-for-profit housing provider in the North East. The group as a whole now generates turnover of over £70m, owning and managing over 17,000 homes across the region, including their partnership with Cestria Community Housing in Chester le Street.



**PRODUCT**  
PSI:Capture  
from PSIGEN

**APPLICATION**  
Invoice  
Processing

**INDUSTRY**  
Housing  
Association

### The Problem

Isos sought a new solution for processing invoices that would allow them to store documents electronically, with easy access for their staff across four offices. The current paper-based system was not only space and time consuming but also prone to errors and lost documents.

### The Requirements

A new solution was needed to help Isos handle paper invoices more effectively and provide quick and easy access through their SharePoint based intranet system. Having an electronic copy of the invoice in PDF format, was also a requirement, so it could be easily found by searching the documents content.

### The Solution

Datafinitivity, who were recommended by their SharePoint partner, TSG, provided a PSI:Capture solution, which Isos chose for its comprehensive functionality, competitive pricing and tight integration with SharePoint. PSI:Capture scans the invoice, reads a barcode generated from OpenAccounts, indexes the invoice and then OCRs the invoice to a text-searchable PDF before exporting documents



and metadata into SharePoint. Isos's finance department now scan over 35,000 documents a year, saving considerable time filing paper documents. Valuable space has been freed onsite – 80,000 documents are now stored electronically – and archives can be accessed with the click of a button.



Reference barcodes are generated in Open Accounts and attached to supplier invoices, which are scanned on multi-function printers and saved to a network hot folder.

PSI:Capture monitors the hot folder, imports the invoices, reads the barcode and splits the value into separate components for indexing.

Scanned documents are converted to text-searchable PDF and stored with index fields (metadata) in SharePoint 2013.

*“Here at Isos, PSI:Capture has enabled our Finance team to process documents quickly and efficiently. Migration into SharePoint also means that scanned documents are easily managed and retrieved using our housing or finance systems whilst paper files have been reduced. Following initial set up there has been little need for IT to get involved.”*

**Greg McIntyre, Information and Service Design Manager, ISOS Housing**

### About Datafinitivity Ltd.

Datafinitivity delivers cost-effective, leading-edge document management and data capture solutions for companies that need to improve the efficiency of business and document processes within their organisation. By providing a combination of innovative market leading technologies and years of experience in document management solutions, Datafinitivity can help improve efficiency, save cost and enhance customer service whilst achieving a fast return on investment.

### About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications, and helps organisations convert content into managed digital assets. Their largest customers include service providers, business process outsourcers, and major corporations with significant customer concentrations in financial services, healthcare, manufacturing and retail.