



## **PSIGEN's PSI:Capture and Web I.Q. Deliver Next Generation Document Imaging Solution for Projections Unlimited Inc.**

Founded in 1980, Projections Unlimited Inc. (PUI) is an authorized distributor of electronic products and services delivering a high level of service at a fair price. Company headquarters is located in Irvine, California, with satellite offices in Milpitas, California and Wilmington, Massachusetts.

### **Space and Productivity Challenges**

In 1999, PUI Credit Manager Mary Lynn Jordan noticed that filing cabinets were taking over significant amounts of space in the hallways and office space of the Accounting Department. Six filing cabinets in the hallway and another six in the accounting offices were filled with accounting files. To keep cabinet space usage to a minimum, older files from the cabinets were regularly moved to storage in the basement, so that the twelve filing cabinets could always maintain the most current file folders.

The manual filing system had grown into a major headache. Accounting Department employees were making more and more trips to the basement, to find files and folders containing credit information, invoices, purchase orders, and more. Moving aged items from the accounting department file cabinets to the boxes in the basement consumed excessive time. Finding and faxing copies to remote branch offices was a slow and cumbersome process, for both sender and recipient.

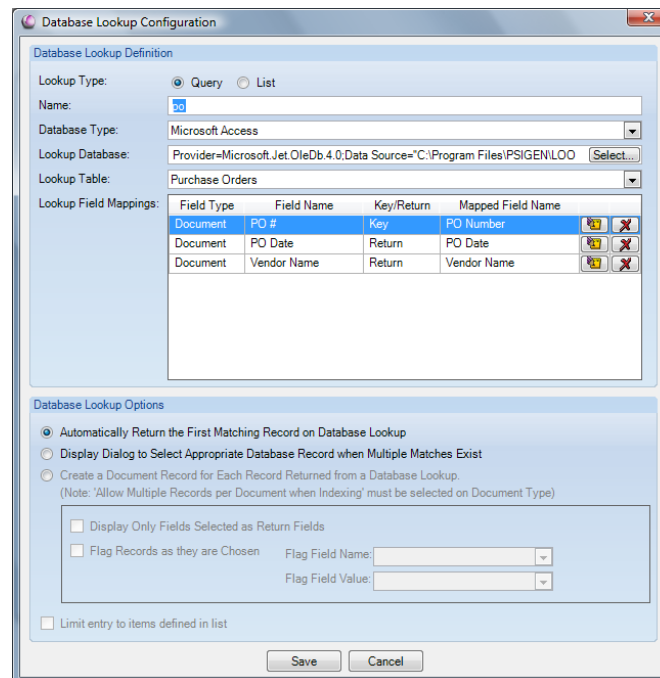
Upper management also had critical concerns related to records management in the Accounting Department. While most accounting documents see additional work activity within 90 days after generation, it is a legal requirement that all such documents be available as records for up to five years after creation. In addition, the annual financial audit typically consists of an examination of the documentation for multiple random transactions.

### **First Steps**

PUI took a cautiously deliberate approach to moving forward, picking a single document type to start scanning first. Day forward scanning of bar coded PUI packing slips began in late 1999 using PSIGEN Software. The system proved to be so easy to use and learn that Mary Lynn Jordan began to add additional document types and users almost immediately. Over the next two years the system progressed through several planned expansions, including:



- The addition of all remaining accounting document types into the capture workflow, including variable multi-page credit evaluations, resale cards, return merchandise authorizations (RMAs), vendor packing slips, debit memorandums, customer packing slips and W-9 forms.
- Back file capture and conversion. PUI had around 20 years of boxes in the basement with critical business records, with the last five years needing to be captured and made available for online retrieval.
- Web based retrieval. In 2001, PSIGEN introduced Web IQ, a browser based solution for search and retrieval of the scanned images. PUI quickly added the web based retrieval component to their installation, enabling the remote offices to retrieve any and all accounting documents needed to conduct business without bothering headquarters accounting staff with manual efforts to find and fax documents.
- Database lookups. PSI:Capture was configured to improve scan/index operator productivity by incorporating database access into the indexing step in the capture workflow, for PUI packing slips, resale cards, and vendor packing slips.



The screenshot shows the 'Database Lookup Configuration' dialog box. It is divided into two main sections: 'Database Lookup Definition' and 'Database Lookup Options'.

**Database Lookup Definition:**

- Lookup Type:  Query  List
- Name:
- Database Type: Microsoft Access
- Lookup Database: Provider=Microsoft.Jet.OleDb.4.0;Data Source="C:\Program Files\PSIGEN\LOO (Select...)
- Lookup Table: Purchase Orders
- Lookup Field Mappings:

Field Type	Field Name	Key/Return	Mapped Field Name	
Document	PO #	Key	PO Number	[Add] [Remove]
Document	PO Date	Return	PO Date	[Add] [Remove]
Document	Vendor Name	Return	Vendor Name	[Add] [Remove]

**Database Lookup Options:**

- Automatically Return the First Matching Record on Database Lookup
- Display Dialog to Select Appropriate Database Record when Multiple Matches Exist
- Create a Document Record for Each Record Returned from a Database Lookup.  
(Note: 'Allow Multiple Records per Document when Indexing' must be selected on Document Type)

Additional options:

- Display Only Fields Selected as Return Fields
- Flag Records as they are Chosen  
Flag Field Name:   
Flag Field Value:
- Limit entry to items defined in list

Buttons: Save, Cancel

Mapping Capture Index Fields to Database Fields for Automatic Indexing

## Expanding into Human Resources





By 2003, the system had proven so useful that additional Human Resource department documents also became attractive targets. Soon insurance forms, personal time off requests, and expense reports were also defined and added to the capture and retrieval workflow.

### **Hardware Partner Integration**

PSIGEN partnered with Canon U.S.A. Inc to integrate several generations of Canon scanner hardware with the PSI:Capture software. The production scanner in use today at PUI is a Canon 6080. During the earlier stages of the project, when both day forward and back file workflows were processed, the Canon device processed as many as 2500 pages per day. The day forward volume is currently running at 500 to 1,000 pages per day.

### **Conclusion**

The implementation of PSI:Capture and Web I.Q. is a win for PUI. Mary Lynn Jordan notes that 'by mid morning each day, all critical accounting documents are available in the system. And all of our locations have instant access. The system is easy to operate. We add and train users ourselves as we grow'. Major business benefits of the document imaging system at PUI include:

- Improved productivity, efficiency, and customer service in accounting and sales
- Reduced cost for storage
- Compliant business records management
- Stress free, rapid audits. Transactions selected for audit are found for the auditors in minutes instead of hours
- Ecological friendliness. After capture, paper documents are recycled

### **For More Information, Contact:**

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