



## Special Report: IT solutions



# Efficiency drive

**Port of Leith Housing Association, which has been at the heart of redevelopment in the Leith area of Edinburgh, is using Invu's document management software to rehouse over 50,000 documents affiliated to its 2,650 properties. HABM finds out how IT solutions can help improve the efficiency of a multitude of housing association activities, including their repairs and maintenance operations.**

**P**ort of Leith Housing Association (PoLHA) has around 2,650 homes on its books and leases properties to about 120 sharing owners. After implementing the Aareon QL system back in 2011, PoLHA reviewed its IT strategy and concluded that a better way of managing electronic documents was needed. In spring 2014, after extensive research into the market, PoLHA embarked on an implementation project of an electronic document management (eDM) solution from Invu.

Neil Donald, ICT Manager at PoLHA explains: "The decision to move the organisation towards an eDM was prompted by the mass of documents we had accumulated – more than 50,000 over almost 40 years. It was imperative for us to have a solution that would enable our employees to have greater control and search capability to retrieve documents swiftly."

By implementing the eDM solution, PoLHA is looking to increase its capability to effectively manage the confirmation of instruction documents, valuation reports, gas certificates, tenancy agreements and post management questionnaires, without having to spend time searching through reams of documents filed either in compact

mechanical filing cabinets or within the Windows-based filing structure.

Neil explains why the move from paper to an electronic solution was so important: "We wanted a system that had a demonstrable track record in delivering document management specifically to housing associations. This switch to instant electronic access to critical documents will reduce our dependency on the vast amounts of paper-based information we have."

### Meeting delivery targets

A key driver for any housing association looking to implement an eDM should be to gain an increased control and insight into their invoice processing with a full audit trail. eDM providers should be able to design a solution to enhance existing business applications, providing greater ability to meet the delivery and performance targets set by the TSA and Scrutiny Panels.

Being able to identify and capture documents with automated workflows will enable housing associations to trigger actions immediately – meaning that there is a real benefit to be gained from having increased visibility and control previously unavailable on a paper-based system. Couple these benefits

with integration into many housing ERP systems and documents will become a streamlined part of the process to:

- improve financial control through detailed auditability;
- reduce administration and accounting costs;
- simplify compliance; and
- raise the service standards for tenants and suppliers.

When implanting any new software solution, businesses should consider the flexibility of the technology to future-proof themselves against new developments. For example, the rise of Bring Your Own Device (BYOD) in the workplace has seen the use of smartphones in the workplace grow, which in the future could have added benefits to maintenance workers whilst on site. Capturing an image of a job on a smartphone camera then assigning the correct tags before uploading it into an eDM will enable images to be recorded against an invoice, tenancy agreement or other auditable document. This will prove useful in the future to provide accurate costings of maintenance work and mitigate against any potential fraud or dispute cases.

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