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	M-Files Viewpoint
<p>In This Issue</p> <ul style="list-style-type: none">• M-Files Viewpoint• Announcements<ul style="list-style-type: none">- M-Files 6.0 Service Release- M-Files OCR• In The News<ul style="list-style-type: none">- Kauppalehti: Users Like M-Files!• M-Files Customers<ul style="list-style-type: none">- CTI Engineers- The Mangold Group- Great Lakes Petroleum• Tech Tip:<ul style="list-style-type: none">- M-Files OCR• Get a Document Management Strategy	<p>Crisis = Danger + Opportunity...</p> <p>Crisis</p>  <p>Danger Opportunity</p> <p>In a recent eBook titled, "8 reasons you need a strategy for managing information -- before it's too late," by John Mancini, President of AIIM (Association for Information and Image Management), there is a quote by John F. Kennedy from a speech he gave in Indianapolis, Indiana on April 12, 1959:</p> <p><i>"When written in Chinese, the word 'crisis' is composed of two characters - one represents danger and one represents opportunity."</i></p> <p>Kennedy gave his speech at the height of the cold war, not long after the shock created by the success of Russia's Sputnik satellite, and while he did speak of the danger he saw posed by the Soviet Union to the West, he was actually focusing on what he saw as a greater danger.</p> <p>Click here to read on...</p> <p>Sincerely, <i>The M-Files Team</i></p>

Announcements



M-Files 6.0 Service Release

As most of you know, Motive Systems released M-Files 6.0 at the end of September. M-Files 6.0 offers a number of exciting new features, including support for Microsoft SQL Server, a new M-Files OCR Add-On module, new features in workflow and assignments, 64-bit server support and save and send as PDF, to name just a few.

One of the key areas enhanced in M-Files 6.0 was Web Access. With the initial release at the end of September, Web Access was still "Under Construction" as some final features were being tuned and tested.

A new M-Files 6.0 Service Release (version 6.0.2325.10) is now available in which Web Access is now finalized and ready for full production use. Please be sure to upgrade both your M-Files Server and Client installations.

The M-Files 6.0 Service Release is available directly from our Web site at the following links:

Existing customers: <http://www.m-files.com/download>
(Note: this link requires a valid serial number)

Trial or Express Users: <http://www.m-files.com/try>

[You can also read about all the new features in M-Files 6.0 here.](#)

Last but not least, if you have any questions about M-Files 6.0 or are interesting in purchasing or evaluating the product, please do not hesitate to contact us at sales@m-files.com.

M-Files OCR (Optical Character Recognition)

The ability to connect to scanners to scan paper documents using the scanning software that comes with the scanner has been available in M-Files for some time, but with M-Files 6.0, the new M-Files OCR Add-on module eliminates the need for additional third-party scanning and OCR software.

Based on the popular I.R.I.S. OCR technology, M-Files OCR interfaces directly with virtually any scanner to produce



searchable PDF files from paper documents.

ID-based Scanning

M-Files OCR also provides "ID-based" scanning for automating tasks such as file naming, defining properties and metadata, initiating workflows, and processing a signed contract based on identification of the contract's signature.

OCR Zones

You can define a zone in which characters located in specific regions on a paper document are recognized as values for metadata properties. For example, an invoice number or customer name located in a pre-defined region of a paper invoice can be automatically captured and stored as metadata associated with the scanned document, enabling automated scanning, categorization and storage of paper documents.

More information is available in the [M-Files OCR Brochure](#).

If you are interested in purchasing or evaluating the M-Files OCR Add-on module, please contact us at sales@m-files.com.

In The News

Users Like M-Files!

Recently M-Files was included in an article in the leading business daily publication in Finland, Kauppalehti.

The article describes how companies' IT budgets are growing, with companies investing increasing amounts in the following areas in priority order: new computers, software and services.

The article goes on to recognize M-Files as one of the [few] "IT systems" that end-users really like.

Kauppalehti writes the following: "Few readers expressed that the system being used in their company is convenient to use. Only a third considered document management, project management or ERP systems clear to use.

...Praises were given to M-Files document management software, ValueFrame project management, and Microsoft solutions."

[You can find the entire article in Finnish here.](#)



Kauppalehti

M-Files Customers

M-Files Case Studies

[CTI Engineers](#)

[The Mangold Group](#)

[Great Lakes Petroleum](#)



The case studies included in this issue of the M-Files Newsletter focus on M-Files customers in Engineering, Accounting and Transportation, but M-Files is also used in a wide variety of other areas including architecture, banking & finance, manufacturing, pharmaceutical, retail sales, shipping & logistics, and more. We're adding new case studies all the time, so contact us at sales@m-files.com if you are interested in one in your industry.

Interested in telling your M-Files success story?

If so, contact us at pr@m-files.com; we'd love to write it up and feature it on our web site and in future newsletters.

CTI Engineers:

Document Archiving Needs Content Management

CTI Engineers, Inc. uses document imaging for old hardcopies, but had a hard time finding the correct version later.

Thousands of companies are now archiving their past digitally. With document scanners available for even large architectural and engineering plans, there seems no reason why firms should fill their office storage with rolls of paper from years ago. While it's relatively easy to save scans on a server, the problem is that for many engineering organizations, the past often creeps back to the present. Engineers often have to refer to old projects and work on them again. The organization of the new digital archive quickly becomes convoluted.

This was the situation at CTI Engineers, Inc., a civil engineering firm with a staff of 70 distributed through six offices in Tennessee, Ohio, and Georgia. CTI takes on civil engineering projects from local municipalities and utility companies, generating stacks of hardcopy infrastructure plans with every new project. Over the years, these paper drawings piled up in rolls and in drawers; at the same time CTI's own AutoCAD, MicroStation, and ArcGIS mapping output accumulated in various network folders on their servers, not to mention reports, specifications, inspection logs, and other project-related files.

CTI's Network Administrator Steven James realized that electronic document archiving is not complete without some measure of content control. He began to research document management systems on the Internet for a simple content

control software that addressed CTI's current situation. "We wanted to store everything in one place and access it from any of the branch offices or on the web – from any computer, basically," he says. "We needed a digital archive that was quickly searchable and easily usable by all of our employees..."

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The Mangold Group Certified Public Accountants, PC

Professional Accountants Get Serious About E-Filing

CPA firm places client records into document manager for big returns

While dealing with your own filing can get out of hand, imagine taking care of other peoples' paperwork. Every year, the Mangold Group of certified public accountants processes bookkeeping for nearly fifty businesses and the tax returns of hundreds of individuals. Each client represents stacks and stacks of financial records, which Mangold places in digital format.

"As the paperwork would come in, we would scan each piece, make a folder for the client in Windows Explorer, and save it under their name," says Michael DuFresne, Technical Service Administrator at Mangold.

After a few stacks through the scanner, mixed together with electronic data that would drift intermittently through CD-ROMs or email, the structure of each client file grew more complicated and arbitrary.

The standard Windows folder set-up also tended towards misplacement of information through accidental drags and drops or the accumulation of multiple versions saved in different locations. Clients trust the Mangold Group to keep their private documents not only secure, but also organized, so CPAs would have no gaps in understanding when assessing their accounting situation. As the tax rush sets in, clients add another demand, urgency.

So to streamline the overall process, Mangold CPAs looked towards document management software for a solution.

[Click here to read more...](#)



Great Lakes Petroleum

Eliminating Steps in Accounts Payable with M-Files

Growing transport company links scanned invoices to its billing software, cutting paper and manual tasks out of the process

Many times, introducing an electronic document management system (EDMS) into office workflow turns out to be an unpopular move, since it requires employees to do even more steps to perform the same task. Systems Analyst Tim Decker used some of his programming ingenuity – along with the flexible M-Files platform – to streamline his company's accounts payable process.

Decker works for Great Lakes Petroleum Transportation, which moves various fuels from sources throughout Michigan, Indiana, Ohio, New Mexico, and Texas. According to Decker, the 37-year-old trucking outfit has experienced more than fivefold growth since 2005, multiplying its fleet to 78 trucks. As the miles of road increased, so did the paper trail in the Alma, Michigan office.

[Click here to read more...](#)

Tech Tip



M-Files OCR (Optical Character Recognition)

As mentioned earlier in this newsletter, with M-Files 6.0, Motive Systems recently released a new Add-on module for M-Files providing integrated scanning and OCR (Optical Character Recognition).

M-Files OCR interfaces directly with virtually any scanner to produce searchable PDF files from paper documents.

[Click here to read the Tech Tip providing an overview of how M-Files OCR works.](#)

Get a Document Management Strategy Today



If you don't already have a strategy for managing your organization's information and documents, take Allim's advice and don't put it off any longer, contact us at sales@m-files.com and we'll help you get started.

Please also feel free to contact us if you have any questions or comments about the articles or information in this newsletter.

We look forward to hearing from you.

Thanks for reading!

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