



## M-Files Success Stories 2009

### Handling a Large Document Load in a Small Office

*Franchise HQ finds success with user-friendly document management software for Windows*



When you have a massive flow of documents, what's needed is often not more time or more people, but a better strategy for electronic file handling. For example, in the main office of Budget Brake & Muffler Distributors, Ltd., a support staff of five handles all the documentation for 33 auto repair franchises that populate Western Canada.

"Even though we are a small office, we have a ton of documents," explains Computer and Franchise Service Coordinator Barb Burns. "The head office is here in Vancouver for all of the locations. We are the largest independent brake and muffler automobile repair company in British Columbia; we have been for a couple of years now, and we're quite proud of it. With 33 owner-operators, you can imagine how much paperwork travels between the headquarters and the franchises."

Burns and her fellow co-workers take careful record of all incoming and outgoing correspondence, and make sure all shops in the organization are up to date with necessary legal, insurance, and operations records as required.

The big problem with Budget Brakes' digital file storage was simple enough, but its standard Windows workstations and server offered no simple solution. It was difficult to ascertain if files had been received, and if so, where, exactly, the items resided. Did brake shop #29 send in a renewal form? It doesn't appear on the server -- but perhaps it's in an email attachment? Or saved on a hard drive? According to Burns, this doubt led the main office to keep a handwritten log of everything received, from whom, and when.

"Even though these records were kept on computer, everything was kept and tracked of manually," she says. "We had a master book where we wrote down file names and descriptions. Handwritten logs made sure we had a hard copy version of file locations, in case we couldn't find it on a digital search."

The logbook was a very tedious way of tracking, Burns says, and only as effective as the weakest link. "If someone forgot to log a file name or didn't write it down correctly, then it became a bit of a nightmare to find that information. We were losing documents and had a hard time

keeping track of information and finding it when we needed it. Basically, it was costing the company money and making us look inefficient.”

### **The straightforward approach of M-Files document management**

Burns knew there had to be an electronic file management solution for such a straightforward problem. But surprisingly few met all the company’s needs. “I was doing research on the Internet for some kind of document management system,” she says. “I don’t know how many trial versions of programs I downloaded, but I had tried several before I came across M-Files.”

M-Files document management software by Motive Systems is a simple extension of the Microsoft Windows environment that attaches additional data about files based on the file’s document type, author, date and descriptive keywords about the content. M-Files records the same vital information that Budget Brake’s logbook did, but in a searchable database. Since this additional file information was included with every “save” action in every Windows application, forgetting to log an item was no longer an issue. All these controls were integrated directly into the operating system, so employees didn’t have to open any separate application to perform digital filing tasks.

“I was really impressed with the system. The most attractive part of the M-Files electronic document manager for me was that all the information regarding the file was in one interface, which I could bring up on any workstation,” Burns says. “The other software I tried was too cumbersome and was not user-friendly. You had to go through several screens to get to what you wanted. Unlike other programs, with M-Files, we could customize what information to include with a particular type of document.”

### **Easy document management integration with Windows server networks**

For Windows Server-run offices, setting up the file management system is surprisingly painless. After downloading and installing the software on the server computer as well as each workstation, employees could immediately start using it. The process of loading existing files into the vault was also straightforward.

“The installation was amazing,” says Burns. “We had a very easy time installing the M-Files document manager. As soon as it was installed it worked perfectly on all of our workstations. Migrating our legacy files to the new document management software was easy, too. After that, everyone picked up on it right away.”

M-Files consolidated all of Budget Brake’s company content from personal workstations, server locations, even incoming email attachments, and indexed each item by keyword, for fast and intuitive searches.

“You don’t have to worry about who created it or what they named it, or where it’s saved. You only have to know something about the content of the document or what it’s used for,” Burns explains. “It certainly solved our problem of finding documents. Now any workstation can bring up any company document,” says Burns. “We have a download file server for the office which

we just migrated to Microsoft Small Business 2008 and M-Files integrated famously with it. I was really surprised how well it worked with the system.”

**About Budget Brake & Muffler, Ltd.**

A commitment to customers has helped the BC owned and operated company achieve and maintain its market position for 37 years. Now British Columbia’s largest Brake and Muffler Automotive Aftermarket repair company, the franchise currently maintains 33 service facilities throughout British Columbia and Alberta. For more information, please visit: [www.budgetbrake.com](http://www.budgetbrake.com).