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*"Before M-Files, employees might have to look for a document in three or four possible folder locations. Now they find it no matter what category they choose first."*

**-David O'Brein**  
IT Administrator,  
E. B. O'Reilly &  
Associates, Inc.

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## Success Story

# New Tools: Established HVAC Contractor Upgrades Office with M-Files

For more than half of a century, businesses in the Philadelphia tri-state area have come to rely on E. B. O'Reilly & Associates for heating, ventilation, and air conditioning (HVAC) installation and service.

After serving in World War II, Edward O'Reilly founded the company bearing his name in 1954 and established the motto that still guides the family business 50 years later: "Keep it simple, don't over-engineer the job, always return a phone message, and never give up on a problem."

Such an approach to workmanship and customer care stands the test of time. However, other traditional methods – such as managing project documents in manila folders – were in desperate need of a modern and more reliable solution.

"We always have had tons and tons of paper around here," says David O'Brien, IT Administrator. "There were a lot of hands inside the various folders. Some things got misfiled or didn't get filed at all. It ran the whole gamut of problems associated with a paper filing system. We needed a way to better manage everything."

The E.B. O'Reilly headquarters was somewhat typical of most of the construction industry, which has tended to stick with the tradition of paper files longer than other offices. To handle the increasing volume of digital files from subcontractors and to mitigate the disorder that came with paper, managers looked for a digital solution.

"One of the biggest challenges we faced was that we have an older staff, some of whom do not have extensive computer experience. So we had to look for a document management system that was very easy to use and employed an interface that was relatively simple."

## The M-Files solution

The office adopted a simple server based system called M-Files to manage documentation associated with its installation jobs, with the plan to phase the system in later for its service department.

O'Brien says M-Files had an advantage over other document management packages since its functionality was seamlessly integrated into Windows Explorer and other common Microsoft Office products. Users went to the same places they did before when saving and retrieving documents.

"One of the key features that we saw from M-Files was the look and feel," he says. "For the most part, the commands and interface were very close to what our employees are working on now [Windows]. There wasn't a huge learning curve for our staff. They don't get stuck, saying 'how do I run this?'"



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*“From the initial sales process through installation, the entire experience went very well. And in just a short time, some long-standing office traditions have begun to change.”*

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## Foolproof organization

Before implementing the M-Files document management solution, managers attempted to have the staff file digital content consistently – but Windows server folders seemed to generate just as much confusion and disarray as manila folders.

“Originally, we had a server file structure and just tried to manage the digital content ourselves. One of the things we noticed was that Windows folders don’t maintain any real organization,” says O’Brien. “When you have a lot of people using the same folders, some will save an item here and others will save the same thing someplace else. It got to a point where it just didn’t work.”

M-Files works differently in that there are no file locations to remember. Each file in M-Files is tagged with metadata, which can include many the same terms employees use as titles for subfolders (i.e., client names, dates, users, document types, etc.). The combination of these key terms serves as a unique ID for the document.

When saving a document to M-Files, users simply click on Save As in the familiar dialogue box and select the relevant category tags. When searching for a document, users type the term(s) in any order. Automatic versioning control saves past copies of a file without generating new filenames. The result is a more efficient system for organizing and managing project documents.

## Linking in existing databases

“We also have an accounting package, the Maxwell Management Suite, which has an older database structure. One of the key criteria was that document management solution had to integrate with that system, since it keeps track of our cost management and accounting data.”

E.B. O’Reilly was able to link its database in real time with the M-Files metadata, which enables employees to locate invoices and estimates instantly and also made searching any item faster and more accurate.

“The Maxwell database also stores our customer contact info, job numbers, and vendor information,” O’Brien explains. To bring up a customer agreement, for instance, a project manager can type in any field in the Maxwell database related to the customer -- last name, street name, phone number, ect, -- and instantly see a list of files related to that customer, including the most recent contract.

## After Phase I

E.B. O’Reilly is still completing phase I of its M-Files system adoption, but so far, O’Brien has been pleased with the rollout. The M-Files technical team assisted our staff remotely during the weeklong installation and also provided additional integration support.

“We’re seeing a lot of our employees who would normally reach for the filing cabinet look it up in M-Files instead.”

## About Edward B. O’Reilly & Associates

Edward B. O’Reilly & Associates is the Delaware Valley’s Commercial and industrial heating, ventilation and air-conditioning (HVAC), climate control and energy management specialists. With more than 50 years of experience in commercial solutions, state-of-the-art technology, and a dedication to customer service, O’Reilly & Associates is one of the Philadelphia’s most trusted family-owned businesses. For more information, visit: [www.eboreilly.com](http://www.eboreilly.com). ■