



M-Files Success Stories 2009

Breathing Fresh Air into Windows:

M-Files gives air solution giant Fläkt Woods new command over its data



Headquartered in Switzerland, Fläkt Woods is one of world's leading manufacturers of air handling units and air terminal devices for non-residential buildings. A global market leader in the production of ventilation systems for infrastructure and industrial facilities, the company ranks second worldwide in fan production for cement plants, tunnels, and subways. With more than 3,500 employees serving customers in 75 countries, Fläkt Woods generates over €670 million in revenue.

Jouni Akras is Design Manager at Fläkt Woods' 65-employee facility in Espoo, Finland. Akras oversees a team of about 12 engineers for design operations for export markets across Europe, Asia, and the Americas, developing blowers and compressors for industrial processes and water treatment.

"Though it's not normally part of my job description," says Akras, "implementing a document management system has been part of my role lately." His team was the second major Fläkt Woods department to switch over to the M-Files electronic document management system, in the company's gradual transition to a simple and efficient digital document solution.

Akras surmises the reasons for change at Fläkt Woods were the same as those for most companies. Many common problems arose out of the standard-issue Microsoft Windows environment. "Even though we had folders in some kind of structure in Windows, finding files was not very efficient. With the Windows folder system, it was easy to make simple mistakes. For example, an employee might accidentally drag-and-drop a file into a wrong folder location. On top of that, you end up having the same files in multiple places – one version on a server, one on a workstation. Maybe different people modify the document for different purposes, and the result over time is multiple variations of the same document. It is easy to forget there's another copy out there, and it very easy to mix things up. So lack of version control was another major reason for us."



Although the focus of Akras' department is design, the document control measures implemented through M-Files were universal, and not limited to just CAD files. "Of course we produce a lot of CAD

files, but we also generate a lot of other files, typically Word, Excel, graphics, and so on. M-Files tracks and organizes all of our documents. For design we are using Pro/ENGINEER to create our 3D models, but once we export final drawings in DWG format, they were stored in folders just like any other document. We wanted a comprehensive solution for product designs and all other support documentation.”

Managing through metadata

M-Files presents a novel approach to the common problems of misplaced documents and lack of version control. The M-Files interface replaces the file-path trees -- what you find in Windows Explorer or in the application dialogue boxes when saving or opening – with a simple set of metadata fields. Instead of clicking through folder structures to indicate a location, users simply enter keywords that define the document, such as the product or customer associated with a project, or general categories, like the phase the document is in a particular workflow, or status, like “waiting for approval.”

Along with date and author information, this metadata becomes the identification for the file, which is stored in one repository, or “vault.” When it comes to retrieving a file, a user no longer has to wander through different file paths in search for the desired information. Instead, a quick and precise search of one or two key terms brings up the document instantly. M-Files removes the requirement to know a “location” with respect to documents. This is true regardless of the number of computers or servers on a network.

Fläkt Woods has also connected the M-Files document database to its main customer and supplier databases. As a result, employees can choose items like customer IDs, supplier IDs, or project names from a drop-down list, without having to type them in.

This means that saving and opening documents goes even more quickly. The database tracking system ensures that files are uniquely identified without multiple versions. Simple “check-in” and “check-out” features treat a collaborative document like a library book – only one user at a time can modify the file, preventing one user from overwriting another user’s edits, whether it is a 3D model or an Excel spreadsheet.

Transitioning a department in a few hours

Because of this simplicity and integration, Akras found M-Files easy to implement throughout his Fläkt Woods department, with very little change to workers’ normal routines. The advantage over other file management systems is that M-Files doesn’t require users to open and log into a separate portal to execute file management tasks. As a result of M-Files’ Windows Explorer interface, saving and retrieval of information occurs in a familiar context: right within the user interface of the applications they use everyday.

“Most people felt good about it. Generally speaking, people tend to resist change. That is always an issue with new software procedures and processes,” explains Akras. “But in light of that, the change went really well. The switch went off the old system and on with M-Files over the weekend. The transition was smoother than expected; it turned out to be a matter of hours instead of days.” Staff

training for M-Files consisted of just a short lecture, and employees began using M-Files immediately Monday morning.

“From my point of view, the biggest appeal was that it was embedded into Windows and into the applications we use. Employees did not have to access a separate application to open and save files -- it was so much better to have them continue to use the same points of access. Another reason was M-Files’ fast search engine. It is very easy to find documents, especially when you don’t know the exact name of the document you are trying to find. It has improved our process a lot.”

One of the prime factors for adopting M-Files in the department was its dual function as a publishing system. “Currently, we have been using multiple methods to share our files with our customers and suppliers – email, FTP sites, making copies of the documents they need, and so on. Now we can just give them a login to a new website to connect to the files remotely,” Akras says. M-Files technicians created custom functionality for the external portal. As in the M-Files document management system used internally, easy permission controls allow outside parties to access whole categories of relevant documents, while still maintaining internal data integrity, security, and organization. “We saw the potential to leverage M-Files in many ways -- the publishing system was one of most important.”

A high level view of operations

If information is power, M-Files proves most impressive in the command it gives managers over hundreds of design and general office projects. Managers can type in a certain project number and determine where it stands in the development process just by viewing what documents have been created, and which are still in progress.

“M-Files also enabled us to embed metadata fields within the documents themselves to improve the functionality of some key files,” he adds. “By viewing a history of the documents, we are also gathering information of when we have published documents to customers and suppliers. We can instantly see what stage we’re at in the workflow. When these embedded fields are combined with the complete version history, we get a full understanding of the design changes that have taken place and all the interactions with our customers.”

After the successful run of M-Files in his area of Fläkt Woods, Akras reports that the firm intends to widen its use of the digital file management system to other parts of the organization as an ongoing process. It turns out that implementing a more effective electronic file system will continue to be part of his job description, as he moves into his new role of IM (Information Management) Area Manager over offices throughout Finland and the surrounding Baltic countries, where around 600 employees may soon enjoy the benefits of M-Files.

About Fläkt Woods

Fläkt Woods is a leading global supplier of energy-efficient air solutions operating in both the air climate for buildings and air movement for the infrastructure and industry markets. Fläkt Woods currently employs more than 3,500 people in 30 countries. For more information about the company and its products, please visit: www.flaktwoods.com.