



M-Files Success Stories 2010

User-Friendly and Manager-Friendly

To administer M-Files DMS, IT background not required



For document management software to work successfully, it needs to be not only user-friendly, but manager-friendly as well. The system should be flexible enough to allow work group leaders to set up and modify common documents and business processes without needing a lot of technical background.

Promaxis Systems specializes in IT consulting for government, military, and commercial clients, but not everybody in the office is an IT expert.

Thirty employees in the Technical Publications Department produce voluminous reports for its clients, including operational guidelines, maintenance manuals, and illustrated parts lists. Here the emphasis is not so much on IT services but on skills such as technical writing, CAD drafting, graphic illustration, and desktop publishing.

Cyril Maillet is manager of the department, which tracks a digital publications library of about 50,000 files.

“Previously we were using other document management software, but it was not very user-friendly,” says Maillet, who like his department-mates, has a skill set other than IT. “It was difficult for the typical office manager without technical expertise to customize the system. You really needed a measure of IT background to maintain the functionality over time.”

For its digital publications library, Promaxis replaced its complicated and high-maintenance DMS with M-Files document management software. M-Files had the same fundamental file handling capabilities as the old system, such as document tracking, version control, check-in/check-out, and automatic workflows, but M-Files was much simpler and more straightforward to use.

Everyday users in his department found the system easy to work with because of M-Files’ complete integration with the Windows operation system and seamless support for any Windows application. Unlike other document management solutions, M-Files operates not as another standalone application that new users have to struggle to learn, but instead it appears as a familiar disk drive icon in Windows Explorer. For the writers and graphic artists, accessing M-Files commands was as familiar as saving to or opening from a hard drive, using the standard commands they already used every day.

As manager, Maillet found it easy to control the overall system without having knowledge of programming or the details of Windows network administration. He could set up classifications for publications, choose the best method of indexing, and design workflows around certain document types.

“The main selling point was the user-friendliness of M-Files. Not only is it easy for individual employees to save and access the files they use, but it’s also simple for managers to adapt the system to the needs of their organization. The average person can administer and customize M-files to best address departmental requirements -- you don’t need to be an IT specialist.”

M-Files operates on a simple premise: each document -- regardless of application -- is saved to a single location with descriptive properties, or metadata, that is efficiently indexed in a database. The metadata attributes associated with each document can be anything managers choose, for example – project number, client name, publication number, document type, or content subject. M-Files automatically stores and indexes these tags along with automatically recording and tracking versions, dates, and authors.

The metadata approach makes filenames less important, and file paths irrelevant. To retrieve files, employees just query one or two important details about the desired file, and M-Files immediately retrieves all possibilities department-wide. M-Files essentially eliminates the dependence on folders and the inefficiencies that come with them.

Users can even create common “views” into the data organized by how they need to find and display documents rather a fixed folder structure. For instance, they can customize their views to display proposals by month, invoices by customer, or all files with their edits, and so on. M-Files provides a dynamic folder structure that can be instantly reorganized based on the need at a given time.

The metadata indexing method is ideal for Promaxis’ digital library of technical documents, as well as for other tracking correspondence. “We save all our emails in M-Files in addition to scans of postal mail and faxes. Employees simply type in a client’s name into the search box and find a chronological list of all incoming or outgoing communications,” says Maillet. “If an issue comes up regarding an event that happened two months ago, an employee can instantly look up the entire history of interactions with that customer and bring up all the related documents.”

The experience of the technical publications department at Promaxis shows that it’s not always necessary to devote significant IT resources to a DMS. The manager-friendly M-Files software is as easy to customize as it is to use.

About Promaxis Systems Inc.

Since 1971, Canadian-owned Promaxis has been providing Technical and IT Consulting Services to federal, provincial and municipal governments as well as private industry. Promaxis Systems is headquartered in Ottawa, Ontario. For more details, please visit: www.promaxis.com.