Case Study

Cancer Society of New Zealand Simplifies Research Grant Process with M-Files

The Cancer Society of New Zealand is a non-profit organization devoted to reducing the impact and the incidence of cancer in New Zealand, an island nation of 4.6 million people where 60 people a day are diagnosed with the disease.

The federation, which consists of a national office and six regional divisions, provides supportive care to patients, delivers health promotion programs focusing on cancer prevention and is a major funder of life-saving and world class cancer research. While many of the Cancer Society’s programs are spearheaded by the Divisions, the National Office is the central hub for the society’s advocacy, education initiatives, grant distribution, national marketing and communication and other national activities.

Cancer Society of New Zealand Digitizes Paper Processes and Consolidates Systems

The National Office is in its first year of deploying the M-Files intelligent information management solution, an effort led by Capacity and Development Manager, Helga Wientjes. Already the office is seeing a major uptick in efficiency and consistency since phasing out its old approach that consisted of managing information via a combination of paper files and network file folders.

“We had a shared drive on our server where we stored our information,” Wientjes said. “It was quite messy. There was a lot of duplication. People couldn’t find what they needed. Over time, the problem got bigger and bigger.”

In addition, its research grant program was managed in a manual manner via a combination of paper documents and spreadsheets.
Wientjes recognized that the organization needed a more efficient approach for managing, securing and processing business-critical information and began researching a solution that could be adapted to meet their specific needs while also easy to use for their staff. The organization also wanted to enable new and improved business processes through the introduction of technology and enable access and collaboration across the Federation and with the Board.

Wientjes reached out to Docsmart Solutions, an M-Files Gold Partner, to explore options for improving the society’s information management approach. After reviewing multiple providers, Wientjes selected M-Files because it was the most flexible and intuitive solution she evaluated. Docsmart assisted the society in its initial implementation and setting up initial workflows.

“Other solutions seemed more cumbersome, less intuitive and more difficult to configure,” she said. “I really liked the flexibility of M-Files. We worked closely with Docsmart and tapped their expertise in configuring our M-Files environment, including invoice processing workflows. They quickly built the structure to suit our needs.”

The National Office’s entire documentation system—including its grants program, its CRM and its invoicing approval process—is now managed in M-Files. Important documents, which sometimes fell through the cracks, are now easier to find, according to Wientjes.

### M-Files Helps Cut Invoice Approval Time

The Cancer Society of New Zealand processes a large number of invoices, many of them from suppliers. Before implementing M-Files, paper invoices used to pile up and could take as long as two weeks to approve. The turnaround time is now much faster because the invoice approval process has been automated with M-Files.

Additionally, the organization is leveraging M-Files as a platform for its board of directors to easily access, share and process information. The society’s president is now able to grant approvals on documents or invoices remotely—he receives an alert when authorization is required, further speeding organizational processes.

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“Almost every day I discover something new, and say ‘wow, I didn’t know you could do that with M-Files.’ There’s a lot of power and it’s a very flexible tool.”

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**Helga Wientjes**, Capacity and Development Manager, Cancer Society of New Zealand
One of the most important functions of the Cancer Society of New Zealand, and one that requires extensive documentation, is its research grants program. The Cancer Society distributes grants to researchers working on prevention and treatments for cancer.

A very defined process governs the grants program, Wientjes explained, and that documentation is now managed through M-Files.

Each year the Cancer Society runs a grant round and considers proposals from researchers working on prevention and treatments for cancer. What follows is an extensive process of assessing and recommending proposals by a Committee made up of external experts who can access all relevant information through M-Files. Ongoing communication between the successful applicants and the Cancer Society (some of which can go on for years as the studies take place) as well as invoices and reports are all captured with M-Files.

Using M-Files to apply metadata attributes to grant applications as an “object” enables the organization to link other relevant documentation and information to that application, such as the research institute that submitted the application and the organization’s contact details.

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M-Files Delivers New Possibilities Beyond Document Management

Working in the National Office of the federation means staying in close contact with the Division from where supportive care services are provided and local health promotion activities are delivered. But with little ability to share information other than by email or less secure cloud based solutions, providing effective and appropriate access to information and collaboration was a challenge.

Not even a full year into the implementation of the M-Files system, it’s a different situation today for the organization. Division employees can access relevant information at their fingertips via M-Files— it’s no longer hidden in email boxes. Since access to information is provided to people based on role, it’s very easy to ensure the right access to the right people, especially with staff changes.

Wientjes said. “Instead of walking down to find a folder or searching around for files on the network drive, I can now find information quickly and easily with M-Files and be confident that it’s the accurate and most up-to-date version. It’s such a different approach. As our employees see how easy it is, they get excited and embrace it completely. Almost every day I discover something new, and say ‘wow, I didn’t know you could do that with M-Files.’ There’s a lot of power, and it’s a very flexible tool.”