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-Michael Felts
Finance Director,
The County of Granville

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The 21st Century Filing Cabinet

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Success Story

The County of Granville Transitions to Electronic Document Management and Improves Response Times to Public Information Requests with M-Files

The County of Granville in North Carolina provides a wide array of services to its citizens including health and public safety, human and social services, environmental management, recreation and cultural opportunities, education and economic development.

"Our office is responsible for County financial information and internal controls, and there are 24 different departments within the organization," said Michael Felts, Finance Director at the County of Granville. "Not only does each department produce a significant amount of documentation, but each one has different procedures and requirements for information retrieval and storage."

"We were utilizing a paper file-based system, which not only was inefficient, but also required us to dedicate physical space for storage. Furthermore, when it came time for us to dispose of documents and records, we had to take paper files to the landfill and witness the documents being burned or buried. As you might imagine, this process was highly unproductive and we desperately needed to transition to an electronic document management system," added Felts.

5i Solutions (Formally DATANET) Helps the County of Granville Transition from Paper to Electronic Document Management

It became clear to the County of Granville that they needed a formal document management solution to not only help them transition from a paper-based system for managing their documentation, but also to ensure they were able to adhere to strict records and retention policies. The organization worked with 5i, an IT sales and service firm with experience working with municipal government entities, to help them identify and deploy a document management system that was best suited to meet their needs. 5i demonstrated how the M-Files document management solution could help the County efficiently move from its outdated paper-based approach to a true electronic document management system.

"M-Files is ideally suited to meet the requirements of organizations like the County of Granville because it's flexible and scalable, and can be easily configured and adapted to meet the needs of entities that have specific policies dictating how information must be managed," said George Sparrow, Senior Executive with 5i Solutions. "With M-Files, the County of Granville can quickly and easily access the information they need, maximize information reuse, eliminate file redundancy and avoid conflicts and data loss."

"5i was instrumental in helping us select and implement M-Files in a manner that supported our specific requirements," added Felts.



Finance and Clerks Departments Streamline Document-Centric Processes with M-Files

The finance department administers the fiscal affairs of the County in compliance with state law and federal regulations, as well as to conform to generally accepted accounting principles. All County of Granville departments are required to track their account payable (AP) records, and prior to deploying M-Files, the finance staff at the County was spending a lot of time researching AP documentation related to existing accounts.

The County's finance department was the first to deploy and utilize M-Files, and they quickly began reaping the rewards from leveraging the powerful document management capabilities of M-Files in several ways.

"The finance group needed a more effective way to archive and manage copies of issued checks along with supporting documentation such as invoices and purchase orders. With the M-Files OCR module, they now scan and capture each item as a tiff file, which is then converted to PDF. With the automatic text recognition feature of M-Files OCR, our scanned files become fully searchable PDF documents, which makes them much easier to organize, manage and find later," said Felts.

The Clerks department supervises and coordinates the activities of the County-funded departments and agencies, and one of the core duties of the department is to manage and store agendas, agenda packets and meeting notes from the governing board meetings that take place twice a month. Each meeting agenda consists of approximately three to four pages, while the agenda packets can include upwards of 150 to 200 pages of various documents and files. The Clerks department also must record and store the minutes from each governing board meeting.

"There are several groups at the County that provide files and records to be included in the agenda packets, and we needed one central repository to manage all of this documentation. M-Files made it easy for our staff to append the appropriate documentation to its corresponding agenda packet in a manner that ensured accuracy and no duplication of files," said Felts.

"The ability to use metadata to securely index and easily find documents has been a huge benefit for us. We don't need an advanced indexing system -- we just use the metadata, which has made the indexing process simple and easy."

Faster Access to Information Enables the County to Respond Quickly to Public Information Requests

The County of Granville receives information requests on a regular basis, both from governing boards as well as from its citizens. In the past, responding to these requests would entail searching for documents in file cabinets and network file folders, which was a time-consuming and inefficient process.

"Not only do our governing boards want more details, but citizens are paying more attention to civil affairs than they have in the past, which has led to more information requests that our office must fulfill. M-Files helps us facilitate these requests in a faster and more efficient manner," said Felts.

County staff can now quickly find and access information requested by internal and external entities, typically in just a few short minutes. The advanced search capabilities in M-Files enables County employees to store and manage documentation in a manner that allows them to conduct a simple keyword search in order to quickly find the files they need.

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“I may not know the check date or vendor spelling, but I can use a keyword search to find what I’m looking for quickly. Prior to M-Files, there was no way we could respond while on the phone with the person making the request. Now with M-Files, we can often facilitate this in a few moments while on the phone. What may have been a 30-minute process before now takes 5-10 minutes,” added Felts.

County of Granville Plans to Expand M-Files Deployment to Additional Departments

With the success the finance and clerks departments have experienced in streamlining their document management activities with M-Files, the County is now preparing to roll-out the solution to other areas of the organization.

For example, the administration department maintains all contracts, and the County is planning to import all of these records into M-Files by the summer of 2013. The County is also looking to leverage M-Files in the social services department, which has a current backlog of more than one million documents.

“Social services is a very paper-intensive department that manages a wide range of documentation relating to income verification, application for benefits and other information that helps determine and identify eligible services and programs for clients in the County. This is sensitive information that must be securely managed and maintained, and we believe M-Files is a great platform to effectively administer this function,” added Felts.

“The flexibility of M-Files is great -- it can serve the diverse needs of our various County departments, and it didn’t require a big capital investment.”

About 5i Solutions Inc. | Innovative, Ideas, Intelligent, Interaction, Information
5i offers a unique perspective to its business. The firm provides a much higher level of technical expertise than many of its competitors which allows greater flexibility in meeting the ever-changing demands of a technology driven service business. 5i provides multiple tools and solutions for digitizing, processing and managing critical documents for various markets. We understand that each of our client’s markets has its own requirements and needs, but one thing that remains constant throughout is the security and management of all our clients’ documents, visit www.5isolutionsinc.com

About M-Files Inc.

M-Files enterprise content management (ECM) solutions transform how businesses manage, secure and share information with a unique metadata-powered approach that organizes and processes content based on what it is, rather than where it resides. Thousands of businesses in over 100 countries use M-Files on-premise, in the cloud or in hybrid environments to improve productivity and quality, and to ensure compliance with industry regulations and standards, including companies such as AstraZeneca, SAS and EADS. ■