

Motive Systems Inc. M-Files 7.0



Feature Set	★★★★☆
Value	★★★★☆
Ease of Administration	★★★★☆
Ease of Use	★★★★☆
Compatibility	★★★★☆
Software Integration	★★★★★
Security	★★★★☆
Reseller Support and Training	★★★★☆
Customer Support and Training	★★★★☆
Documentation	★★★★☆
Global Business Readiness	★★★★★
Upgrade Path	★★★★★

OVERVIEW

M-Files 7.0 is a multi-user document management solution for small to medium-size businesses. Rather than storing, organizing and managing different documents and document versions housed in different locations, such as employees' desktops, laptops, and in file cabinets, with M-Files 7.0 organizations can store everything in one central location.

M-Files can tie into almost any business environment as it works with all Windows applications and most database systems, including CRM, ERP, billing systems and more. The system can incorporate both scanned hardcopy and new and existing electronic documents (including e-mail), while the detailed indexing information used to tag each document makes it easy for workers to quickly find the document they're looking for.

What is Document Management?

Document Management, which is part of content management (sometimes called enterprise content management, or ECM), enables users to organize and manage electronic documents created by a wide variety of applications. When used with scanners or MFPs, document management solutions help organizations convert paper documents into electronic files. This not only allows documents to be accessed far more quickly, but also enables users to collaborate on the information the documents contain much more easily.

Document management solutions are designed for companies that need to empower their employees to work collaboratively or handle document-intensive processes that require many people to access and edit documents. These solutions are designed to aggregate and share content created in nearly any software application and they often make files readable by users who do not have the associated software installed on their PCs.

Product Profile

Product: M-Files

Version: 7.0

Software Developer: Motive Systems

Minimum Server Requirements:

800-MHz Pentium III CPU, 512-MB RAM, Microsoft Windows Server 2003, Server 2008, Server 2008 R2.

Client Workstation Requirements:

Minimum hardware required to run the operating system; Microsoft Windows 2000, XP, Vista, Windows 7; Mac and Linux users via standard Web browsers.

Supported Devices: Direct interface for WIA-compliant scanning devices and “hot folder” interface for all other scanning devices; MFP control panel access via devices equipped with Nuance’s eCopy ShareScan solution and connector.

Availability: The solution is available directly from the developer as well as hundreds of independent solution providers and resellers.

Suggested Retail Pricing: On-premise pricing starts at \$495 per license; hosted “cloud” licensing also available on a per-user/per-month cost basis.

△ What We Thought



Positioned between entry-level desktop solutions and enterprise-level platforms, M-Files 7.0 is an appealing document management solution for the SMB market. Key strengths include its flexible pricing, easy installation, and intuitive user interface. Thanks to seamless integration with Windows, users can capture paper documents from scanners/MFPs, as well as electronic documents such as Microsoft Word and e-mail messages. Support for indexing information (metadata) and optional OCR capabilities make it easy for users to find the documents they're looking for and to keep everything organized.

The M-Files solution is easy to deploy; any in-house IT department or IT-proficient business owner will be able to do so in no time. In addition, because of the familiar Windows Explorer front-end, end users will be instantly familiar with the M-Files interface. The M-Files repository (called the vault) looks and acts like any other accessible drive, so users will have no problem quickly adapting to it. In addition, commands such as Open, Save, Save As are the same as they are in Windows, so users are instantly familiar with how to interact with the vault.

Tagging the documents, or adding the metadata, is the key to successful document management, and is intuitive with M-Files. Any file, whether created within the vault or saved to the vault, can't be saved until all the appropriate metadata is filled in. In addition to its strong indexing capability, this solution has excellent search-and-retrieve features. In testing, we were impressed by how quickly we were able to retrieve documents with M-Files. In fact, retrieval was so fast that we suspect users may turn to search more than to the dynamic folder structure to locate documents.

M-Files also supports a rich workflow feature. Users can easily define and create workflows, and associated assignments are automatically emailed to the appropriate employees. Additionally a user can easily access any assignments associated with a workflow directly through the M-Files UI. We were also surprised to find that M-Files recognizes only WIA scanners by default, not TWAIN devices that represent a huge chunk of the entry-level scanner market; Motive Systems notes that M-Files will work with TWAIN scanners (or any scanner) via a simple hot folder approach.

M-Files is available as both an on-premise software solution and as a hosted cloud-based service called M-Files Cloud Vault. M-Files Cloud Vault eliminates the need to purchase or configure a server, so it is easy and fast to get up and running with limited or no IT resources.

Motive Systems offers flexible licensing for M-Files. Organizations can have a mixture of named, concurrent, and read-only licensing. M-Files also supports a Web publishing tool that can be used to easily share documents in read-only mode with external suppliers, customers, contractors, etc. In addition, OCR capabilities, SharePoint, and CRM (Salesforce.com, Dynamics CRM) connectors are available for an additional cost.

While we are impressed with the features M-Files delivers for the price, we were disappointed not to see support for TWAIN scanning devices, nor a native connector

for the embedded software platforms offered by most leading MFP vendors (customers need to purchase Nuance's eCopy ShareScan platform and connector to accomplish this level of integration). Still, overall, this solution is well-suited for small to medium-size businesses looking to streamline an abundance of documentation in one central repository.

Strengths

- Seamless Windows integration
- Strong search-and-retrieve functionality
- Concurrent license pricing option
- Hosted "cloud" option
- Metadata indexing options
- Capture paper and electronic data

Weaknesses

- OCR capability and SharePoint integration are optional
- Client application compatible only with PCs running Windows
- Direct integration only with WIA scanners by default
- Does not include redaction or advanced annotation tools
- MFP control-panel integration only via eCopy ShareScan platform

Feature Set



M-Files is a powerful solution for managing, finding, and tracking documents and information and delivers most of the features a company would need from a document management system. Features include check-in/check-out, version control, workflow and notifications, permissions-based document access, efficient search capabilities and remote access via a Web browser.

M-Files supports all Windows file types for storage, including Microsoft Office, PDF, CAD, e-mail, images and more. The system can be tied to virtually any external

database. The program also offers robust document preview capabilities, with the ability to preview most any Windows file format. The M:Drive, or “Vault,” is made available to all Windows applications as well as WIA scanners, so users can save to the M:Drive directly from within the application or scan directly to the Vault.

SharePoint connector and OCR capability are optional add-ons. The latter employs the I.R.I.S. OCR engine and includes OCR Zoning, which allows users to scan in documents and via OCR convert information in certain areas to be stored as metadata. For example, a user can scan a batch of invoices and have the OCR zone feature pull the invoice number from each and store it as part of the invoice metadata before the invoice is saved in M-Files.

The program does not offer the ability to highlight and redact (black out) passages in a document, nor does it deliver more advanced annotations—sticky notes, markup tools and the like; instead, users need to open the document in its native application and perform such actions (if offered by the app). In addition, users can use 3rd party applications for redaction.

Features New to Version 7.0

- Support for Microsoft Office 2010 and AutoCAD 2011 file formats
- Automatic saving of e-mail messages with their metadata by means of Microsoft Outlook rules
- Automatic association of contact persons and customers with e-mail messages
- An M-Files flag for indication of messages that have been saved to M-Files
- Listing of related objects below the main object by object type; easy review and editing of documents relate to, i.e. an assignment or customer
- Grouping of search results by object type
- Interactive shortcuts for making the search results more specific
- Subordination of search criteria
- Easier creation of indirect views
- Specification of indirect searches and filter settings
- Favorites View
- Extended filter properties
- Preview of files in metadata card
- Definition of icons for value list items
- Additions of the icon selection
- More convenient workflow assignments
- Shortcuts for changing the workflow state
- Automatic specification of users on the basis of an object's metadata
- Pre-filtering of value lists for properties
- Support for larger document vaults (over a million documents)
- Improved management of fault situations by means of server settings

Value



Motive Systems lets companies choose between a Named User license model and a Concurrent User License model (read-only licenses can also be added). M-Files pricing starts at \$495 per Named license; volume discounts are available. All pricing includes upgrades and support for one year. The support agreement can be renewed on an annual basis for 25% of the new license price. BLI finds this to be slightly higher than the average continued support fee, which typically is about 18% to 20%.

Companies choosing to add the OCR functionality will incur an additional cost of \$1,295 or more depending on how many named and concurrent licenses are in use. The SharePoint Server module cost is \$3,990.

All told, M-Files' pricing is competitive with similar mid-market multi-user document management platforms BLI has evaluated, while the package delivers a few more features than some others. For this market, BLI especially likes the concurrent pricing option, which makes it easier for smaller businesses to implement a powerful document management solution.

Ease of Administration



Unlike higher-level document management systems, M-Files does not require a professional services engagement from the reseller in order to get up and running. Rather, the client/server installation can be installed and configured by in-house IT personnel or an IT-proficient business owner. For small workgroup usage, both the client and server can be installed on the same PC. Installation doesn't take long: an install wizard walks you through the steps and it takes about five minutes to install the server application, simply check the last two of the three boxes under Normal Installation (M-Files Server and M-Files Server tools) and wait for the install to complete.

To set up the clients, simply run the M-Files set-up on each client and select the first check box under Normal Installation (M-Files Client), and hit Next. On the client computer you have to then define a connection to the appropriate Vault, located on the server, by selecting Client Settings from the Program menu.

To create a new vault, administrators can start from scratch or use the sample vault provided by Motive Systems (or any other vault) as a template. Copy the sample vault by clicking on Sample Vault/Operations/Copy Vault; the new vault will appear under the Vault node. Administrators can then customize the structure of the vault and grant access to users.

Creating and capturing metadata correctly is a key element in any document management operation and it starts with the administrator's set up. To set up the parameters of the vault, the administrator chooses Object Type (such as Document, Customer or Project). The object can be further defined by Classes; this divides the object type into more functional categories like Proposal, Memo, or Contract. For each Class the administrator can define metadata (i.e. properties), which a user completes upon saving a document into the vault. Properties can be required or optional and can be customized on a per document type basis.

Adding users in M-Files is an easy two-step process. First, the administrator has to create a login for the new user at the server level. Next, the administrator goes into the vault that he wants to add the user, clicks Users, and adds the person. (A user can be added to more than one vault.) A list of users can also be imported from Active Directory or any LDAP server.

M-Files Server can be integrated with existing databases, such as CRM and ERP databases. All databases with OLE DB or ODBC drivers are supported, such as SQL Server, Access, Oracle, and MySQL.

An administrator can also define workflows that users will be able to choose from when they enter or access a file stored in the M-Files vault. An example of a workflow may be Invoice Circulation or Proposal Approval. Administrators will also need to perhaps set up a Scan hot folder for users who need to scan documents directly into M-Files, but don't have a WIA scanner. (M-Files can recognize WIA Scanners, but not TWAIN or ISIS hardware without a workaround.)

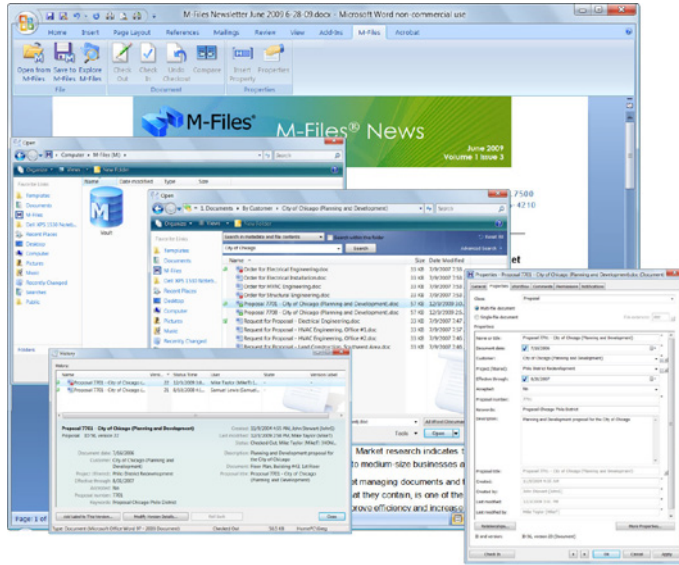
Ease of Use



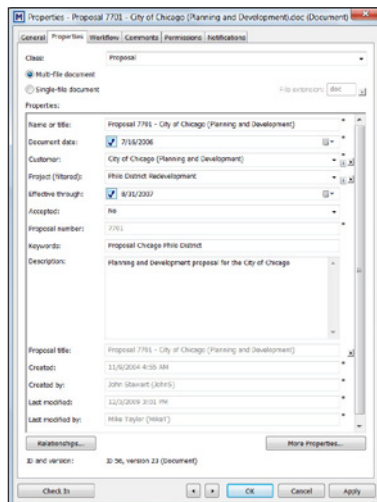
For end users, learning how to use M-Files is very straightforward. Once the administrator has installed M-Files on a user's computer, it looks, feels, and acts like part of Windows Explorer. The vault appears on the client's machine as a virtual local M:Drive, and to the end user looks like any other accessible drive.

The M:Drive doesn't just look like any other accessible drive, but acts like one too. Users interact with it the same exact way they interact with their local drive. For example, they can drag and drop files into M:Drive from other drives on their computer, or when using any Windows application such as Word or Excel for example, simply Save As to the M:Drive.

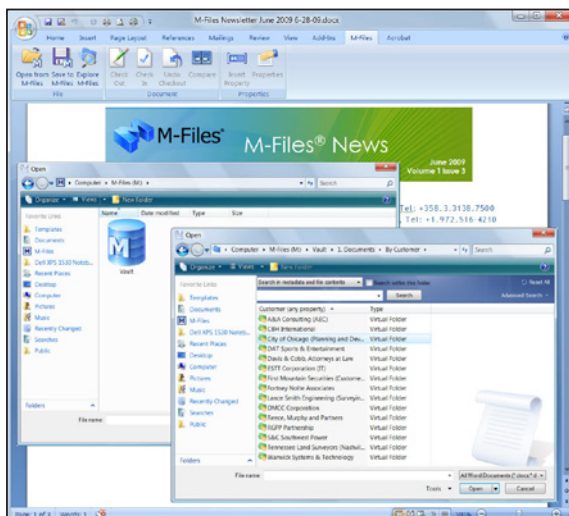
Interacting with documents is equally intuitive thanks to familiar commands such as Open, Save, and Save As – each works the same as they would in any Windows program. And because M-Files supports all Windows file types, including Microsoft Office, PDF, CAD, e-mail, images, etc. users don't have to change the way they do work.



M-Files uses Windows Explorer as its standard interface so a user can access the document vault the same way he or she would explore M-Computer or My Documents.



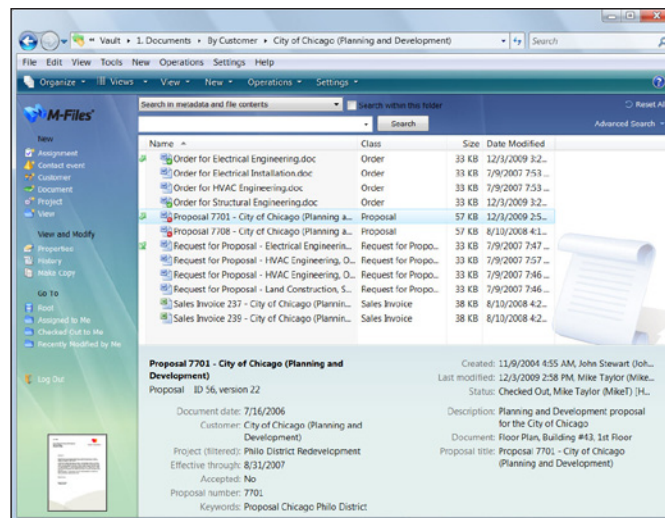
The M-Files "Metadata" card that pops up when creating a new document, either directly via the M-Files interface with a right-click menu or the New Document shortcut in the left-hand pane of the M-Files Windows Explorer interface, or directly from any Windows application using the standard File Save or Save as commands.



The M-Files Dynamic view capability enables documents to be organized and displayed in a virtual folder structure based on any metadata property or tag, in this case Documents by Customer.

When accessing the M-Files vault, the documents look like they're organized within traditional folders; however these folders represent "dynamic views" into the data-base. These views are defined by the metadata. For example, a user can create a view called ABC Corp., and all documents tagged with ABC Corp.— Word docs, e-mails, images, invoices, PDFs, PowerPoint presentations—will be accessible through that view. And of course, one document can be found in many views. For example, the ABC Corp. Invoice #1211 may be found in the ABC Corp. view, but also found in the Invoice view. By default, the views on the first page are "Common Views" and "Other Views"; to define a view, simply click the word 'View' in the left menu, and choose the appropriate settings.

Tagging the documents, or adding the metadata, is intuitive with M-Files. Any file, whether created within the vault or saved to the vault, can't be saved until all the appropriate metadata is filled in. (The administrator has already defined some of these fields, and has determined which fields are must fill-ins and which are optional.) For example, if the user wants to save a new document to the vault, he goes to Save, and a dialog box will appear with metadata fields to be filled in like Class, Name, Customer, Product, Project, Invoice Number, Keywords, etc. All fields with asterisks must be filled in, non-asterisk fields are optional. Once these are all filled in, the document will be saved in M-Files.



M-Files supports Dynamics Views which allow files to be organized and displayed as "virtual folders" based on any metadata property.

There are also two other important features - Permissions and Workflow - surfaced in the metadata card. A simple Permissions menu allows a user to choose individual users or groups of users that have access to the document; Motive Systems provides the following examples in the Sample Vault: Full control for all internal users; Only for me; Visible to company management only; Visible to HR department only; Visible to me and company management only. Additionally, a user can choose to

initiate an automated business process upon saving a document in the vault via the Workflow feature. It is even possible to automatically initiate a workflow when a specific type of document is created. For example, if an invoice is saved to the vault it is possible to automatically enable a Process invoice workflow which would then send automatic e-mail notifications to members of the accounting team.

Finding documents is quick and easy using the Search bar at top. The search engine scours the metadata or the documents' content or both simultaneously. The indexing engine can search many file formats including Office, e-mail, PDF, and even CAD formats. The advanced search mode lets you drill down even deeper by narrowing down the search properties. (For example: You can specify that you only want to search for phone numbers that start with 201.) In BLI testing the search engine found what we were looking for in no time. It was so easy in fact, we think users may be more inclined to employ search to locate documents instead of using the views.

BLI would like to see support for barcode cover sheets, so files scanned in a batch are automatically routed to the proper vault and indexed appropriately. This is one feature not found in M-Files that some other platforms do offer, and would make the package even easier to use.

Compatibility



M-Files 7.0 supports scanning from WIA scanners directly, but surprisingly TWAIN-only devices are not visible to the M-Files client. That's not to say you can't scan from a TWAIN device; M-Files Server connects to external data sources, such as a designated "hot folder" and can monitor the folder for any new documents, importing them into M-Files automatically. An end user could also simply drag-and-drop scans manually from a desktop/network folder into M-Files.

Unlike many multi-user document management packages BLI has evaluated, M-Files does not offer a native connector to any of the embedded software platforms of MFP makers directly. On the plus side, there is an available connector for Nuance's eCopy ShareScan capture/routing platform. With that, users can capture hardcopy documents to an M-Files vault directly from the control panel of the MFP.

M-Files is compatible with all Windows operating systems since Windows 2000. While the M-Files server and client are not supported on Unix, Linux, and Mac operating systems, Mac and Linux users can still use M-Files via its Web Access interface in any supported Web browser.

Software Integration



M-Files supports all Windows file types, including Microsoft Office applications, PDF, CAD, e-mail, and image files. A user can save a document created in Microsoft Word, for example, to the M-Files vault just as they would save it to their computer's hard drive.

M-Files can be integrated with existing databases, such as CRM and ERP databases. All databases with OLE DB or ODBC drivers are supported, such as SQL Server, Access, Oracle, and MySQL. M-Files also offers an optional SharePoint connector for use with SharePoint repositories. The platform's open API (application programming interface) lets developers write their own connectors. And for adding users, M-Files supports Active Directory integration.

Security



When creating a new document or saving a document to M-Files, you can easily set the permissions from a drop-down menu. This pre-determined list can be set by the administrator and may include permissions based on customized groups of users based on functional role or responsibility level at the company; examples include Full Control for All Internal Users, Only For Me, Visible to HR Only, Visible to Company Management Only, and so on for a range of privacy settings.

M-Files automatically tracks all document versions, or history, of any file saved or created in a M-Files vault. In addition to allowing access to previous versions of a document, M-Files keeps an audit log with usernames, timestamps, and comments for every document.

However, unlike some other multi-user document management solutions, M-Files does not include file encryption capabilities. A company must buy and implement a third-party encryption utility to encrypt files on the back end. It also does not include redaction capabilities.

Company Profile

Vendor:	Motive Systems Inc.; Dallas, TX, United States
Phone:	972-516-4210
Web:	www.m-files.com
Status:	Privately held
2010 Revenues:	Not disclosed
Employees:	< 100

Reseller Support and Training



Motive Systems offers a channel program for solution providers and resellers that enable them to market and service M-Files in conjunction with their existing product portfolio, generally as a highly complementary offering to existing software and hardware document and information management solutions.

Motive Systems requires that all new resellers invest in a Reseller Starter Kit (RSK). The RSK includes a number of beneficial items that help a new reseller get started including an introductory 8-hour administrator training course, a set of licenses that can be resold immediately, access to ready-made marketing and sales collateral, and NFR licenses for demonstration and support purposes. Motive Systems also provides sales training for new resellers and assists on an as needed basis with presales efforts in both a sales and technical capacity.

Each reseller has a dedicated Channel Account Manager assigned to them responsible for helping the reseller with sales and marketing activities. Additionally, resellers and their customers can access the M-Files support team via phone and e-mail.

Phone support in the US is available from 8 am to 6 pm Central. Support is free to resellers.

The M-Files Partner Portal provides a wide variety of resources including training materials, custom API examples, etc. Additionally, Motive Systems provides technical webinars on a regular basis to help partners (and customers) learn about specific features in M-Files.

Customer Support and Training



M-Files resellers have the option of providing professional services and training for their customers, either on-site or remotely. Motive Systems provides resellers with training materials they can use for these purposes. Resellers can also choose to use the Motive Systems services team for customer implementation projects and training if needed.

The reseller is also responsible for first-line support of customers. Should an issue arise that is beyond the abilities of the reseller, the reseller can escalate the support incident to a Motive Systems tech support representative. Motive Systems has a toll-free support line in the U.S., 800-224-4074, which is available from 8 am to 6 pm Central time.

There are a plethora of end-user resources online, such as video tutorials and end-user manuals. There are also brief Tech Tips PDFs and video demos that pinpoint certain actions, like the video demo that shows how to scan into M-Files.

Documentation




Motive Systems does a nice job of giving users comprehensive documentation. Much of it is made available through the M-Files Web site, which is more convenient than just offering in-program help. The PDF User Guide is 244 pages long with a hyperlinked table of contents. Explanations here are thorough and easy to understand and follow.

Also, there's a very useful 30-minute video tutorial that can be used as a comprehensive introduction to M-Files. It is broken into 2 parts: User and Administrator. There are also several mini-PDFs that hone in on instruction of certain tasks such as Importing Files and Folders and Defining Dynamic Views.

Additionally, M-Files has a dedicated YouTube channel (<http://www.youtube.com/MFilesDMS>) that includes a number of brief videos that illustrate specific M-Files features and functionality. New videos are added regularly.

Global Business Readiness



M-Files is sold worldwide, and the company maintains its North American headquarters in Dallas, TX and European headquarters in Tampere, Finland. Unlike many solutions that are available in only a handful of languages, M-Files is currently available in 21 languages: English, German, Italian, French, Spanish, Arabic, Russian, Chinese (Traditional and Simplified), Finnish, Slovenian, Hungarian, Croatian, Swedish, Portuguese, Greek, Turkish, Vietnamese, Polish, Dutch and Japanese.

Upgrade Path



Motive Systems pursues an aggressive upgrade schedule for M-Files. “Point release” upgrades happen a few times a year, with a full version upgrade typically arriving once a year. In addition to offering M-Files 7.0, the company offers M-Files CRM, a customer relationship management platform.