



MORRIS
& ASSOCIATES

"M-Files document management software turned out to be an excellent fit for our situation, and we keep discovering new uses beyond those we initially envisioned."

-Heather Kent
Information Technology
Manager,
Morris & Associates

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Success Story

Filling the Document Management Gaps in Enterprise Resource Planning (ERP)

Manufacturer Integrates M-Files into ERP System to Manage Essential Data

As the name implies, Enterprise Resource Planning (ERP) applications encompass entire processes inside an enterprise. Casting such a wide net, however, means the software sometimes overlooks the finer details. Industrial manufacturer Morris & Associates discovered a low-cost secret to further customize its ERP, plus gain a handle on company documents.

The enterprise in this particular case is the manufacture of industrial-scale chilling equipment. Morris & Associates' packaged refrigeration equipment is used predominantly in poultry processing, while its commercial-sized ice machines find customers in diverse industries, from pharmaceuticals to ski-resort snowmaking.

"The ERP system stores all of our vendor information, customer data, projects, job processes, as well as our inventory," Information Technology Manager Heather Kent explains. The company's ERP application was a system developed by SysPro. "Pretty much the entirety of our business is located in this one application, but not everything. There are some data we'd like to include but can't."

For example, the company enters all its part information in its ERP application, but the application holds no place for a photograph or drawing of the part. "When we look up a part number, we want to bring up the essential data, but we also want to verify visually if we've selected the right component."

M-Files document management software: a companion to ERP

Through an Internet search, Kent discovered M-Files, a simple document management software solution. Initially, she just wanted to impose some order on some messy folders on shared network drives, and she found M-Files priced more competitively than SysPro's document management module. After installation, Kent found that M-Files not only provided all the tools necessary for organizing, managing, and tracking documents, but also for automating tasks that fell outside the ERP application's capabilities.

"With M-Files, we can actually pull our entire list of parts that we have in our database. Any time a new part is added to the ERP, M-Files will automatically pull that information into its database."

When Morris employees save JPEGs of mechanical components in M-Files, they can index it with the appropriate part number from a drop-down list inherited from the



“One of the great things about M-Files is you can use SQL queries to directly pull information from our existing ERP databases and link it to documents, projects and contacts in M-Files.”

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ERP system. “Now whenever we search for that part number in M-Files, it brings up all related company documents including the JPEG image of the part.”

Storing multiple contacts per company

Another overlooked detail is that the SysPro ERP database at Morris only allows one contact person per customer or vendor. In reality, Morris staff communicates with several representatives from big customers like Tyson or Butterball, and a number of different salespersons at large suppliers. Kent can easily augment the ERP by incorporating the new contact fields in M-Files.

“It’s easy enough to pull back all the contact information we already have in the ERP system and put it M-Files where we can then link to additional information,” explains Kent. “So instead of looking up a name in the ERP, we look it up in M-Files. It’s much quicker than actually logging into the ERP system, and it provides us much more information.”

All-purpose, easy-to-use document control

Kent finds M-Files extremely effective at keeping Windows documents organized and secured in a way that any employee can understand. Because M-Files integrates directly with the Windows operating system, users simply use the familiar Windows Explorer interface as they normally would to access files. They can also find the M-Files interface through the File Open and Save commands in any Windows application.

Linking the user-friendly M-Files directly with the ERP for special tasks gives Morris an integrated system with complete document management capabilities.

About Morris & Associates

Morris & Associates are the chilling specialists. A leading manufacturer of packaged refrigeration equipment since 1949, Morris engages in both U.S. domestic and worldwide export markets. Morris & Associates develops commercial poultry chillers, water rechillers, heat exchangers, ingredient pumps, industrial icemakers, and ice rakes and bins. To see all Morris products, please visit: www.morris-associates.com. ■