

## COMPANY



## PARTNER



## INDUSTRY



## LOCATION



## DEPLOYMENT



## WHY M-FILES?



# Case Study

## SATRA Technology Taps M-Files to Transform and Optimise Business Processes and Quality Management



SATRA is an independent research and testing organisation that works with companies in a variety of sectors around the world to improve the performance and safety of a wide range of products and materials. As well as testing products and components to European and International standards across a wide range of industry sectors, SATRA develops, manufactures and sells test equipment. SATRA is also a notified body for the CE marking of products and for ensuring compliance by auditing to quality systems ISO 9001 and ISO 14001. Compliance and compliance related processes are at the core of SATRA's business.

In April 2015, SATRA began a search for a solution that would address the company's information management requirements. As SATRA evaluated enterprise information management (EIM) solutions, M-Files quickly jumped to the top of the list.

M-Files Gold Partner FileExpert offered the initial expertise and guidance that helped SATRA quickly understand the many ways in which M-Files could improve information management and streamline business processes, while simultaneously providing quick access to digital information in the labs. The ease of use and configurability of M-Files rapidly set it apart from other EIM solutions, meaning that SATRA could implement and start using it quickly with a fraction of the resources that would otherwise have been needed.

# M-Files®

## THEY SAID IT



“I am yet to find an information management challenge or business process we could not address using M-Files.”

**Kane Rason**  
IT Manager  
SATRA

### Legacy to Next-Generation

Prior to implementing M-Files, SATRA operated a legacy application as general document storage and an archive for historical data. However, the software for this system was no longer well supported or widely used within the company. FileExpert assisted in migrating this historical information into M-Files by linking into the historical data sets, before sifting, sorting and categorising the data for import.

SATRA was immediately able to use M-Files views to recreate the way in which its employees had been accessing and saving information. This powerful capability, along with an intuitive user interface ensured that people supported the concept of M-Files from day one.

“For the first time ever, we were able to create and visualise relationships between our documents and business objects. This has given us a completely different way to manage our information” said Kane Rason, IT Manager at SATRA. “Once we truly understood how we could leverage metadata, we could see more and more ways that M-Files could add value and transform processes across our organisation.”

The first key business process SATRA addressed was the certification process, which had been relatively manual. A hardcopy file was compiled including paper copies of documents associated with the certification application, and this file was physically transferred around the building for completion and collation.

The M-Files workflow has largely digitised and automated this process. This key workflow ensures all tasks and reviews are completed on time by notifying relevant parties by email when any action is required. Furthermore, all of the documentation related to the checklist is managed centrally in M-Files to ensure that staff in any location are always working from the latest version. At the end of the process, a certificate is automatically generated and populated using metadata, signatures are added and the certificate is then ready to be emailed to the customer.

SATRA has also integrated M-Files with QlikView, a business intelligence tool. This provides the SATRA team with a dashboard that includes a graphical view of key M-Files workflow processes, enabling them to rapidly identify the number of certificates at any given stage of the workflow. This has proven invaluable to SATRA management in avoiding bottlenecks or anomalies in the certification process, and by transforming traceability from a passive compliance requirement into an active business process monitoring function.

SATRA now plans to leverage M-Files workflow capabilities in other parts of the business:

“I am yet to find an information management challenge or business process we could not address using M-Files,” said Kane Rason.

**M-Files<sup>®</sup>**

## ABOUT FILEEXPERT

M-Files Gold Partner FileExpert believes that only by a thorough understanding of a customer's needs and objectives can a suitable system be recommended. For this reason the approach adopted when engaging with prospective customers aims to be more collaborative and frequently involves a proof of concept that demonstrates real understanding of requirements rather than potted demonstrations and generic presentations. This approach is carried on through the system lifecycle and technology refresh in FileExpert's customer base which in part explains why some are still customers after 20 years. For more information visit [www.fileexpert.co.uk](http://www.fileexpert.co.uk).

## ABOUT M-FILES

M-Files enterprise information management (EIM) solutions eliminate information silos and provide quick and easy access to the right content from any core business system and device. M-Files achieves higher levels of user adoption resulting in faster ROI with a uniquely intuitive approach to EIM that is based on managing information by "what" it is versus "where" it's stored. With flexible on-premises, cloud and hybrid deployment options, M-Files places the power of EIM in the hands of the business user and reduces demands on IT by enabling those closest to the business need to access and control content based on their requirements. Thousands of organisations in over 100 countries use the M-Files EIM system as a single platform for managing front office and back office business operations, which improves productivity and quality while ensuring compliance with industry regulations and standards, including companies such as SAS, Elekta and NBC Universal. For more information, visit [www.m-files.com](http://www.m-files.com).



## Quality Management

Auditability and traceability are crucial to everything that SATRA does. Auditors review the testing process end-to-end on a regular basis to check that all the correct actions have been taken at the correct times. The audit management capabilities in M-Files make it simple to not only produce the latest version of documents and information for auditors; but also offer traceability by showing the full history of amendments along with historical versions at any prior point in time.

SATRA is certified to three quality systems; ISO 17025, ISO 17021 and ISO 17065 and is required to rewrite its quality manuals to remain compliant with updates to the standards. Doing these alterations manually had previously proved time consuming; prior to M-Files, when updates were required SATRA had to save and manage three copies- the original, the new version, and a version with all tracked changes shown so it was clear where updates had been made. SATRA now uses M-Files to centrally store and manage all its quality manuals as controlled documents. With M-Files, the team can now simply browse back through old versions and compare them side by side to review changes as necessary. Most crucially though, there is now only one latest and up-to-date version of any manual published and in circulation while the quality team work on revisions in the next version. SATRA also uses M-Files to set review periods for manuals and other controlled documents. This automation ensures notifications are sent promptly via email so that deadlines are never overlooked.

## Access Anything, Anywhere

SATRA operates throughout the world and employees frequently travel between locations. M-Files enables employees to access what they need regardless of whether they are at their desk in the UK, visiting the office in China, working remotely or in the laboratory. They can access anything, anywhere, on any device while still enjoying the same user experience.

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