



OMNILEDGER

# DATASHEETS

## M-Files Document Management with Pyramid

Storing and managing large quantities of paper documents is expensive. This is especially true for Housing Associations, where an auditable trail of all activity relating to their tenants and properties needs to be indexed, stored and archived for retrieval and possible disposal at a future date.

All of which requires dedicated resources, whether it's storage, time or money. To address this OmniLedger have become an M-Files partner.

M-Files are a leading document management solution provider and OmniLedger have now developed a direct interface via Pyramid to provide instant access to an entire vault of electronic information.

Essentially it's an Electronic Document Management System, or EDM, with powerful and flexible indexing that allows document categorisation to cater for individual departmental requirements.

It's easy to get lost in acronyms: EIM, ECM, ERP, CRM, etc, so to cut through the jargon, Pyramid M-Files manages everything.

This includes documents, images, projects and processes, by simply adding intelligence, so you can **always find what you need, when you need it!**



### Find and access content based on what it is, not where it's saved

Sometimes finding the right document when you need it seems impossible. Where was that file saved? Who edited it last?

### What if it didn't matter?

Pyramid M-Files organises everything in a central vault based on what it is, so you never have to remember where it's saved or which version is the right one, as only one copy is ever saved.

### Integration with MS-Office

At the point of raising an arrears letter in MS-Word the document can automatically be saved to the Pyramid M-Files vault with the correct indexing (meta-data), i.e. tenant key, property key, document category, etc, making retrieval simple in the future.

### Fully integrated with Pyramid:

- ◆ Rent Accounting
- ◆ Repairs and Maintenance
- ◆ Financial Suite

### Fully integrated with Microsoft Office:

- ◆ MS-Word
- ◆ MS-Excel
- ◆ MS-Outlook

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## What does Pyramid M-Files provide:

- ◆ One simple way to manage and access information
- ◆ Save and access documents based on what it is, not where it is
- ◆ Secure content, whilst accessible
- ◆ Workflow
- ◆ Version control
- ◆ On premise, Cloud & Hybrid Cloud solutions

## Remove traditional folder structures:

- ◆ Save documents based on type and not destination
- ◆ Access the same document in multiple locations
- ◆ Find documents faster
- ◆ Intuitive search

## Enforce Policies & Procedures:

- ◆ Only one version of every document
- ◆ M-Files keeps track of all activities and assignments
- ◆ Controlled deletion and destruction of documents
- ◆ Document templates
- ◆ Automate rights and permissions

## Document Scanning:

- ◆ Paperless environment
- ◆ Full OCR control
- ◆ Multiple location retrieval
- ◆ Automatic permissions for secure documents

## Finding A Document

- ◆ Search document metadata
- ◆ Content Search
- ◆ Personal and public "Views"
- ◆ Favourites

## The Advantages of EDM:

- ◆ Fast Search
- ◆ Automated and meta-data controlled access permissions
- ◆ Version management
- ◆ Workflow and notifications
- ◆ Fast offline use and remote/mobile access as standard
- ◆ Support for scanned paper documents and email
- ◆ Web access available
- ◆ Robust interface for connecting to external databases

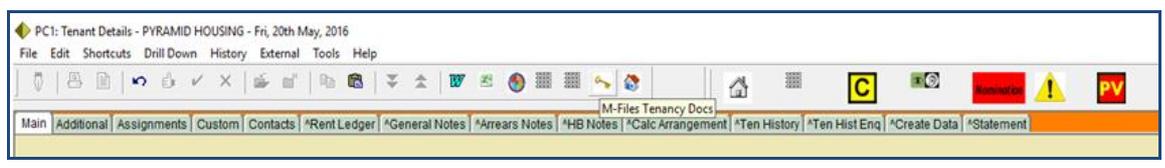
## The Bigger Picture:



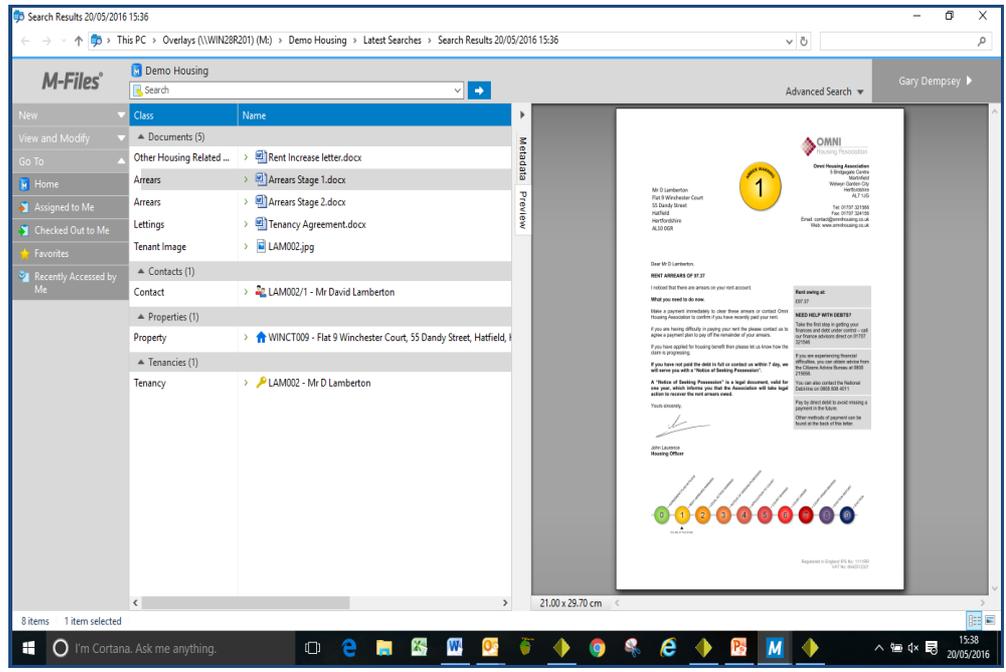
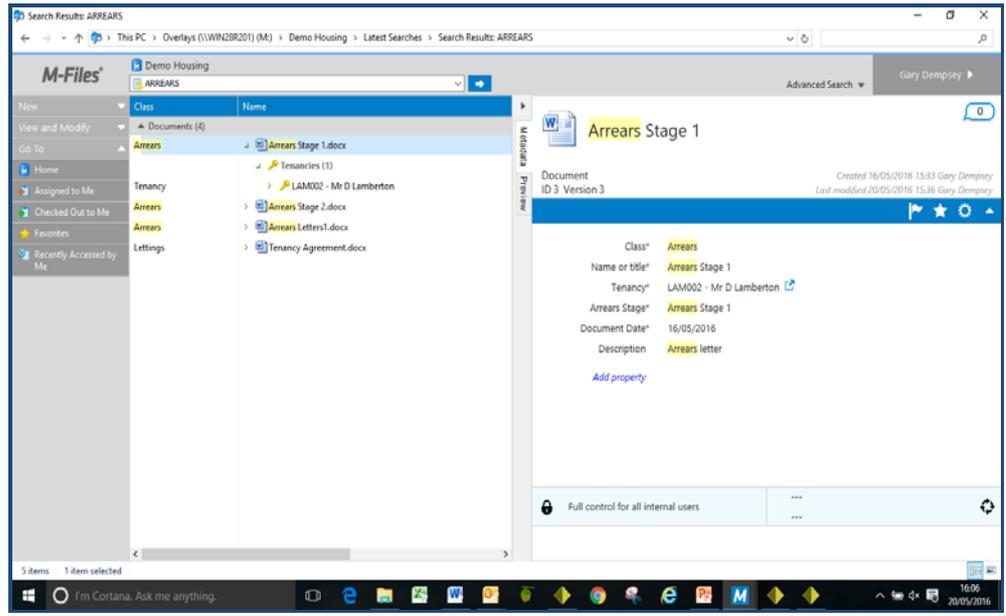


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Simply access Pyramid M-File via the Pyramid Tool Bar. The last property or tenant key is automatically submitted as part of your search!



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