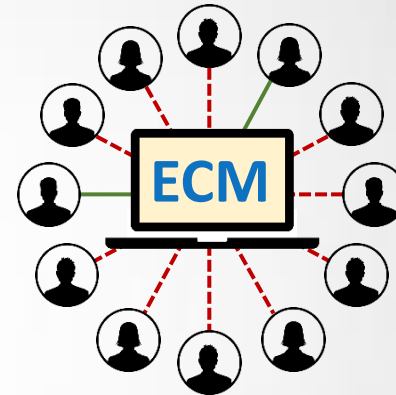
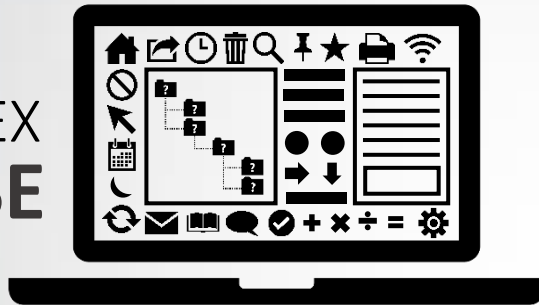




DYNAMIC CONTENT MANAGEMENT

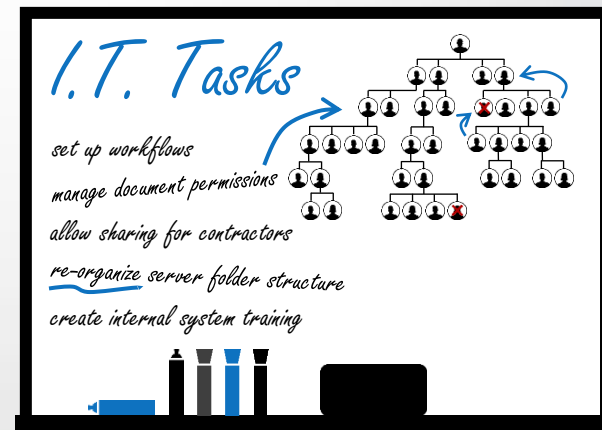
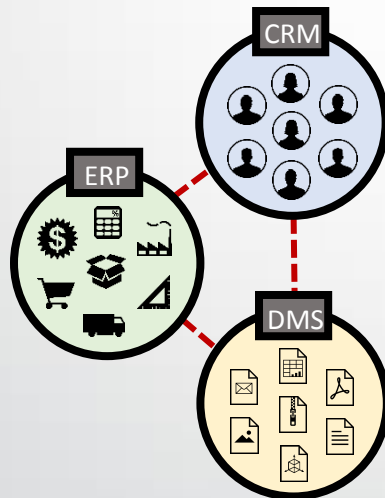
the problems WITH MOST ECM SYSTEMS

too
COMPLEX
TO USE



low
USER
ADOPTION

independent
SILOS
of
INFORMATION

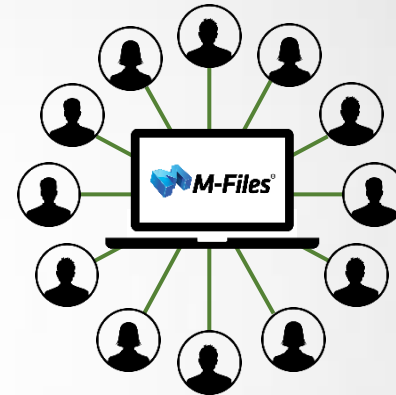
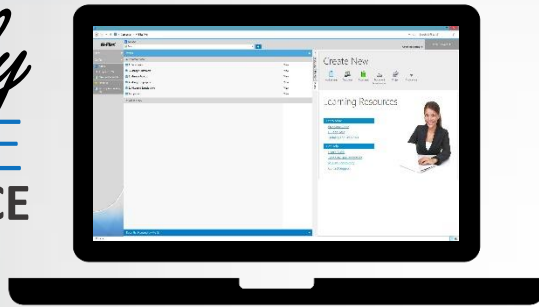


too
IT
CENTRIC



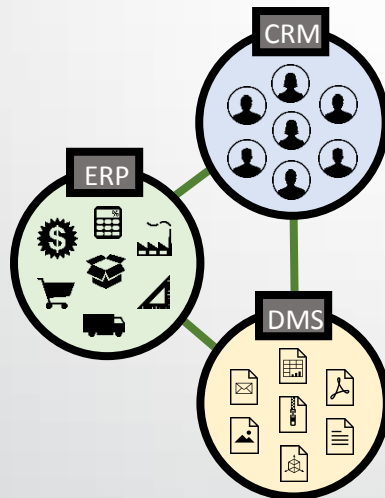
our solutions TO THE ECM DILEMMA

a truly
SIMPLE
INTERFACE



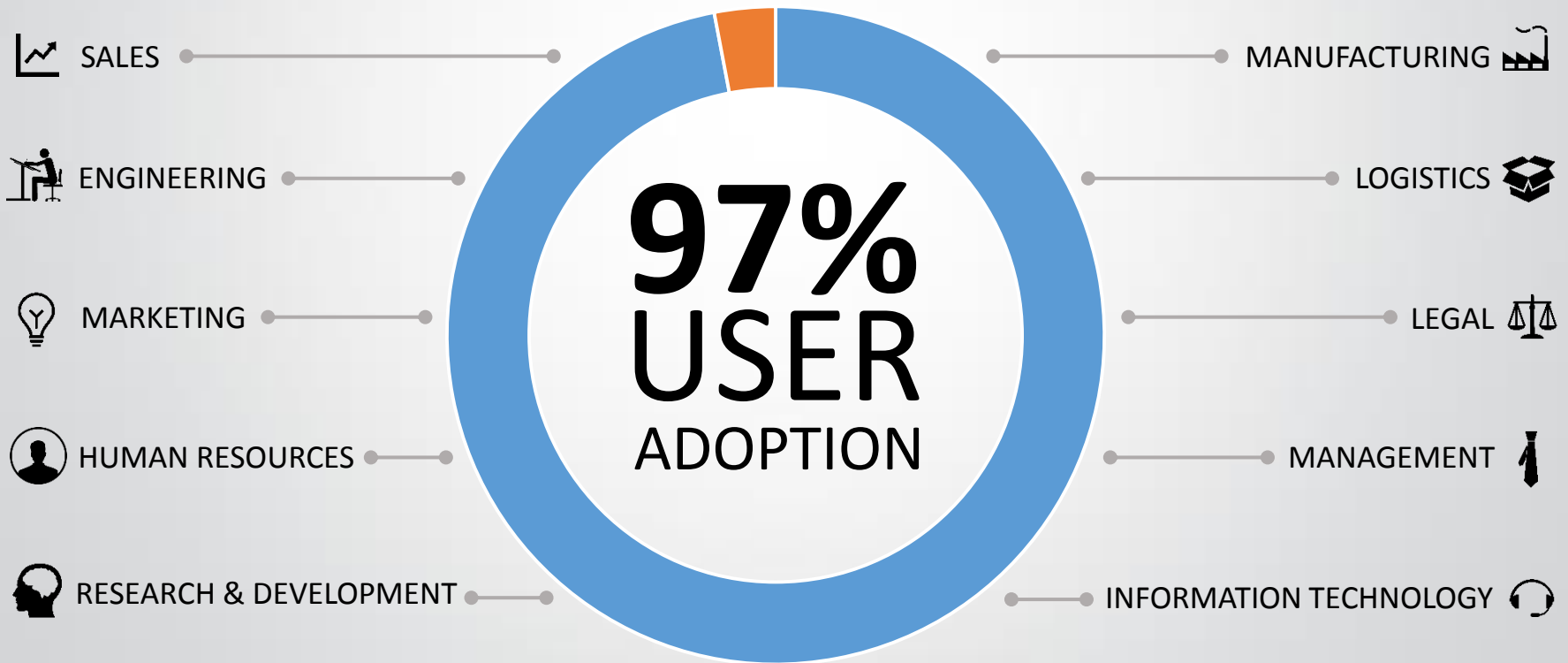
high
USER
ADOPTION

all of your
INFORMATION
is
CONNECTED

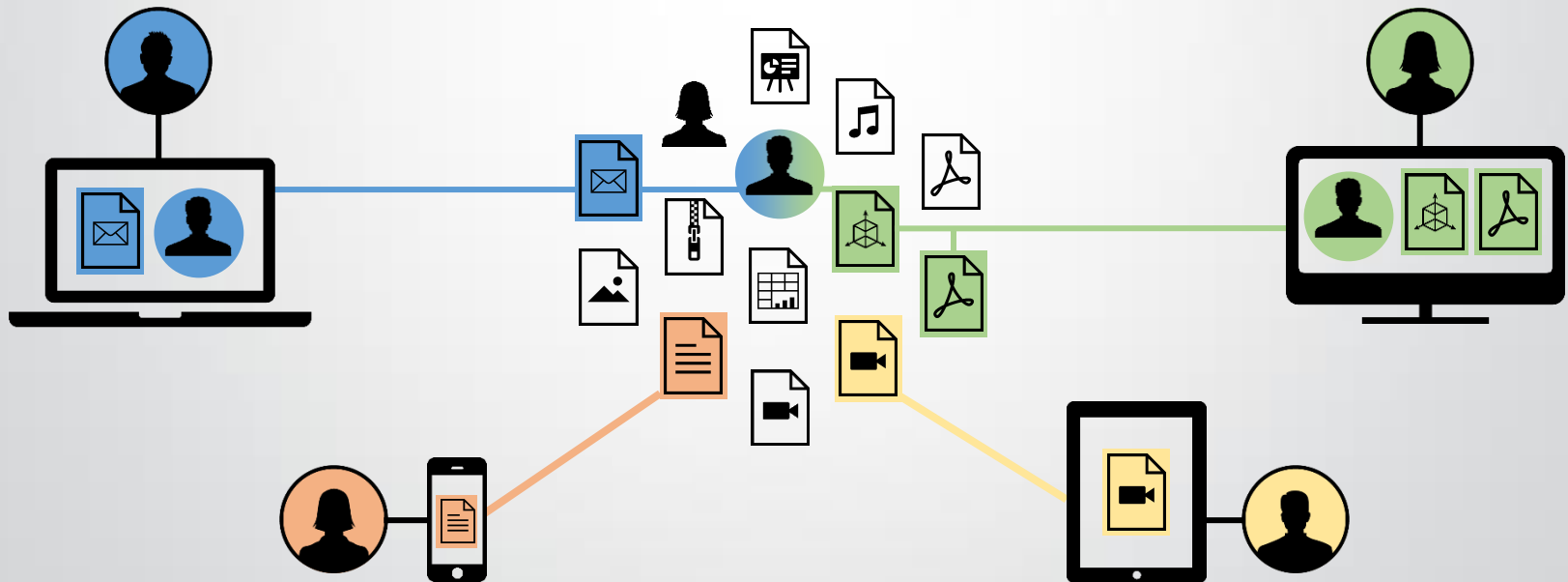


gives
CONTROL
BACK
to
USERS

what if THE NEW SOFTWARE YOU DEPLOYED
WAS USED BY **EVERYONE** ?



what if YOU COULD ACCESS **ANYTHING**
AT **ANY TIME**
INSTANTLY ?





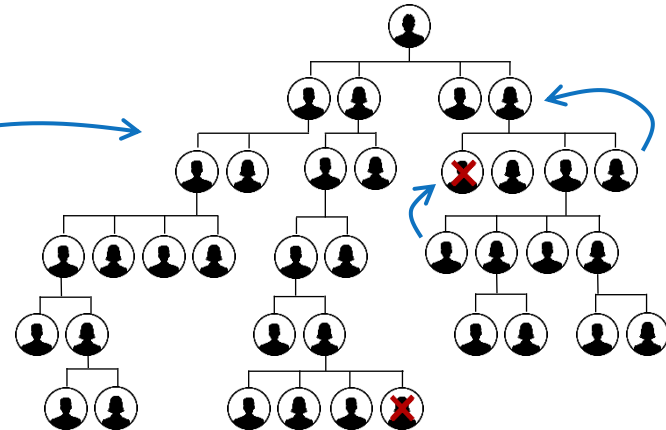
what if YOU COULD **RUN YOUR BUSINESS**
WITHOUT BOTHERING THE
IT DEPARTMENT ?



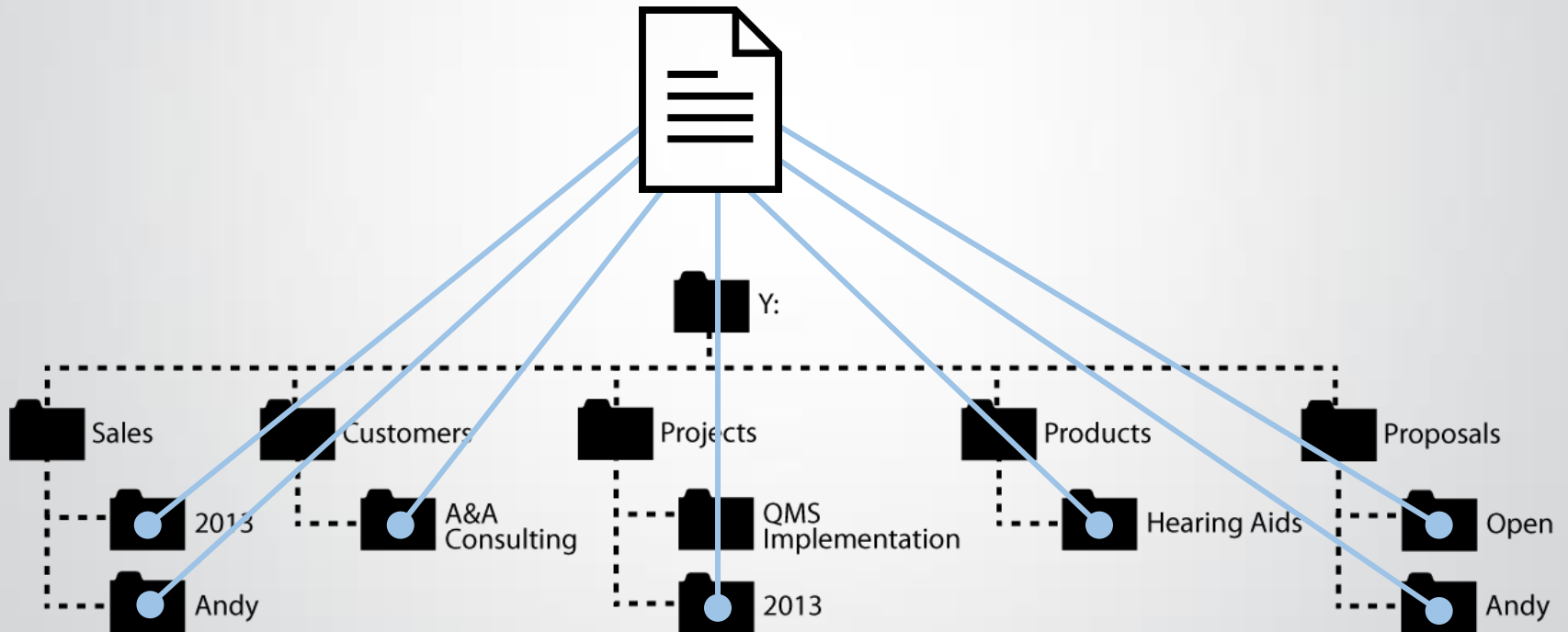
what if YOU COULD **RUN YOUR BUSINESS** WITHOUT BOTHERING THE IT DEPARTMENT ?

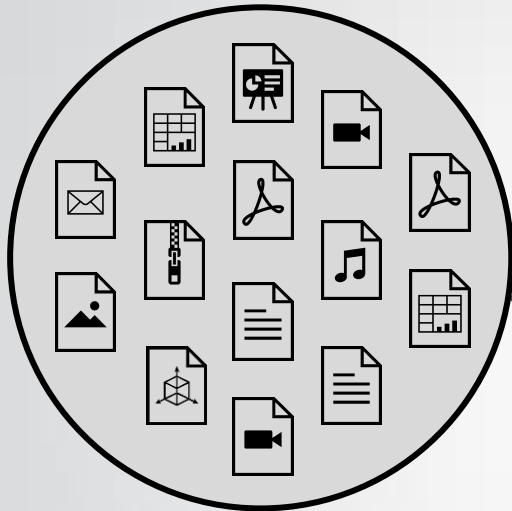
I.T. Tasks

set up workflows
manage document permissions
allow sharing for contractors
re-organize server folder structure
create internal system training



what if **WHERE YOU STORED YOUR DOCUMENTS
DIDN'T MATTER** ?





DYNAMIC CONTENT MANAGEMENT

organized by

WHAT *vs* **WHERE**
SOMETHING IS IT'S BEEN STORED



DOCUMENT TYPE



CUSTOMER



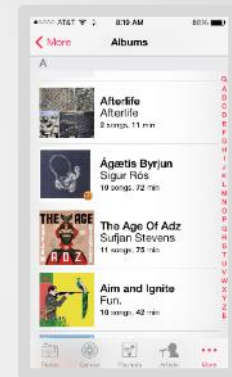
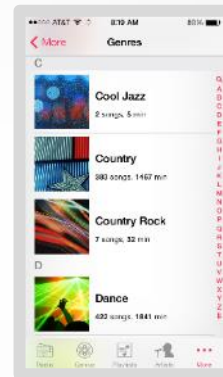
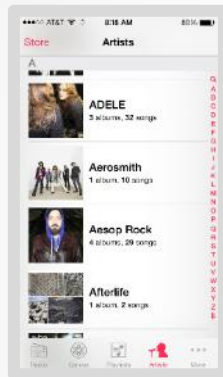
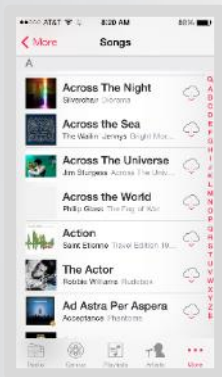
DATE



PERMISSIONS



it's as simple as an ! iPhone



PLAYLIST



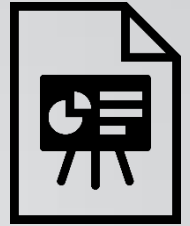
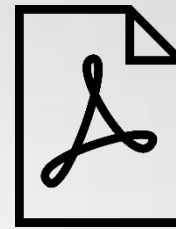
ARTIST



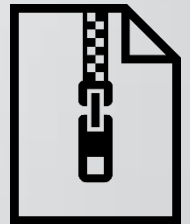
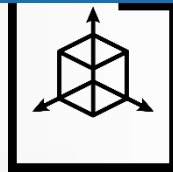
GENRE



ALBUM



WHY IT MATTERS



why MANAGE CONTENT?

★ CHAOTIC NETWORK FOLDERS

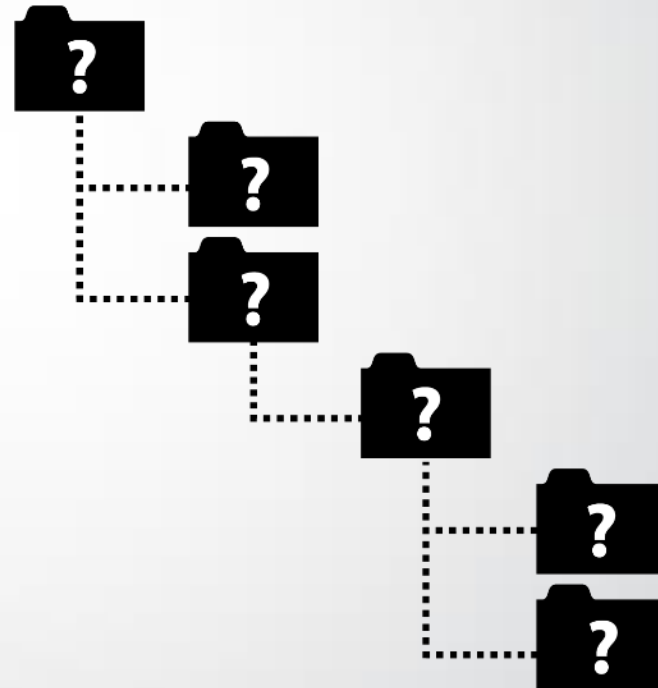
★ DUPLICATE FILES

★ EMAIL ATTACHMENTS

★ PAPER DOCS

★ DATABASES

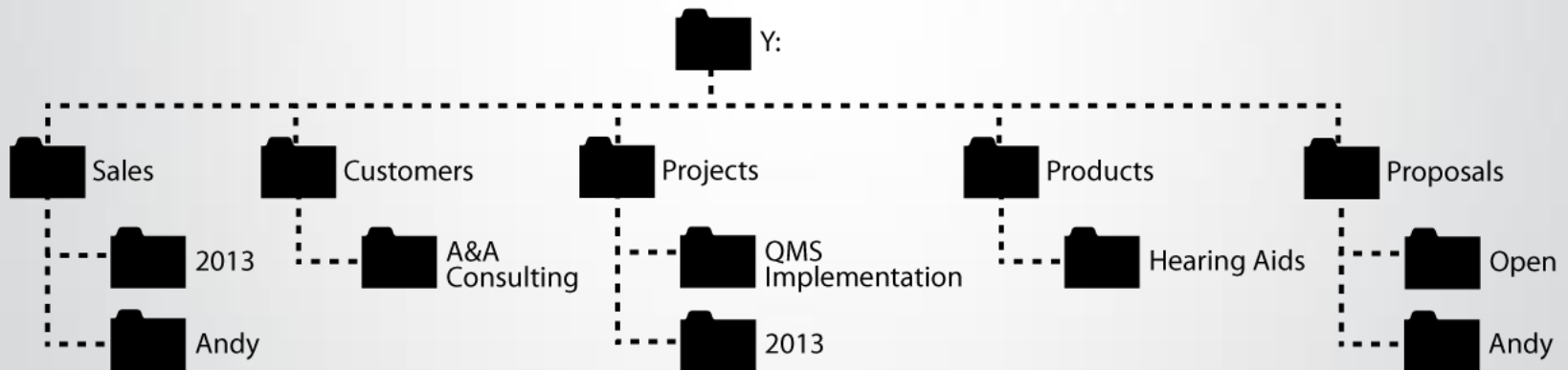
★ EXTERNAL MEDIA





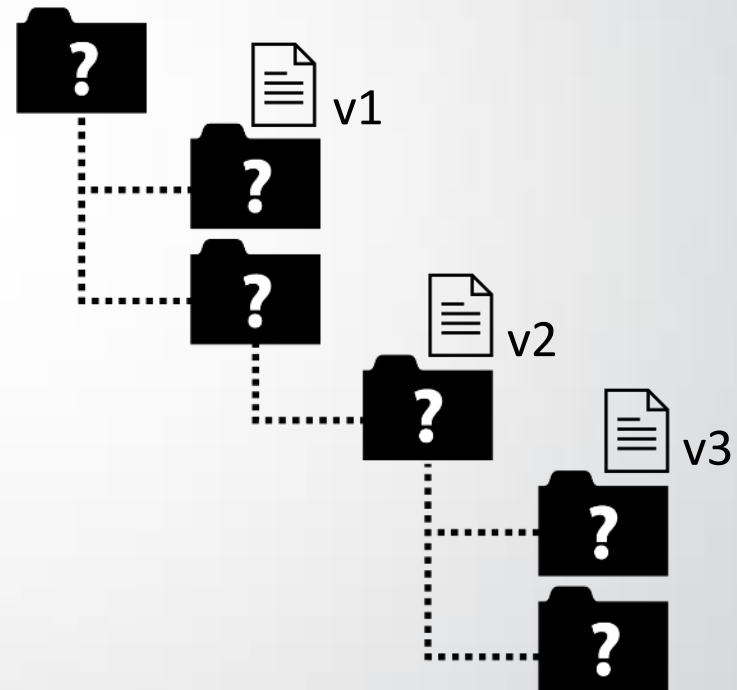
Hearing Aid Proposal 2013
for A&A Consulting
Prepared by Andy

WHERE IS THE **BEST PLACE** TO SAVE THE DOCUMENT?



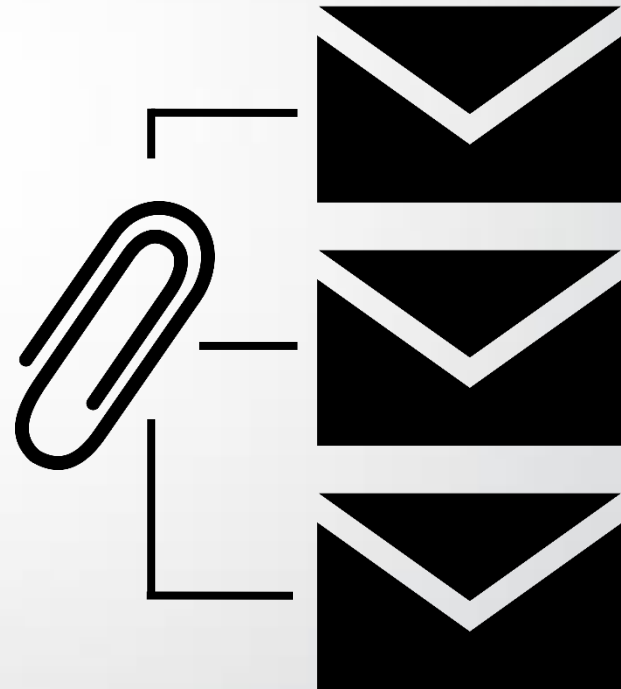
why MANAGE CONTENT?

- ★ CHAOTIC NETWORK FOLDERS
- ★ **DUPLICATE FILES**
- ★ EMAIL ATTACHMENTS
- ★ PAPER DOCS
- ★ DATABASES
- ★ EXTERNAL MEDIA



why MANAGE CONTENT?

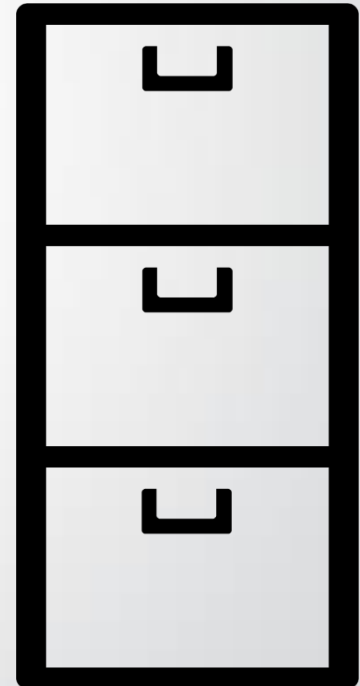
- ★ CHAOTIC NETWORK FOLDERS
- ★ DUPLICATE FILES
- ★ EMAIL ATTACHMENTS
- ★ PAPER DOCS
- ★ DATABASES
- ★ EXTERNAL MEDIA



THE AVERAGE DOCUMENT GETS COPIED **19X** DURING ITS LIFE
- COOPERS & LYBRAND

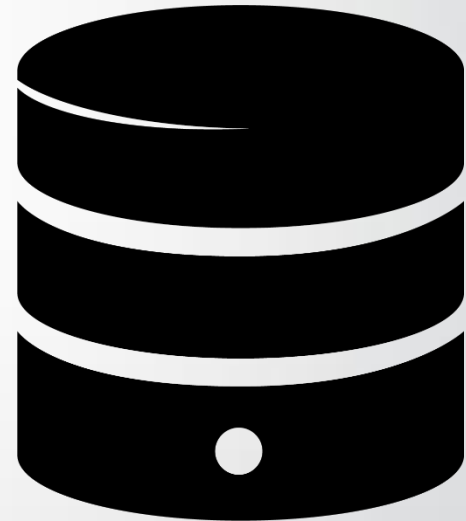
why MANAGE CONTENT?

- ★ CHAOTIC NETWORK FOLDERS
- ★ DUPLICATE FILES
- ★ EMAIL ATTACHMENTS
- ★ PAPER DOCS
- ★ DATABASES
- ★ EXTERNAL MEDIA



why MANAGE CONTENT?

- ★ CHAOTIC NETWORK FOLDERS
- ★ DUPLICATE FILES
- ★ EMAIL ATTACHMENTS
- ★ PAPER DOCS
- ★ DATABASES
- ★ EXTERNAL MEDIA



why MANAGE CONTENT?

★ CHAOTIC NETWORK FOLDERS

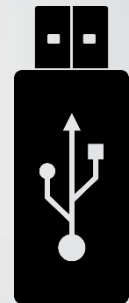
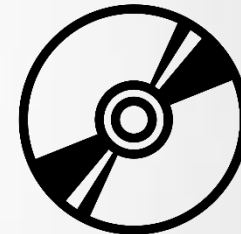
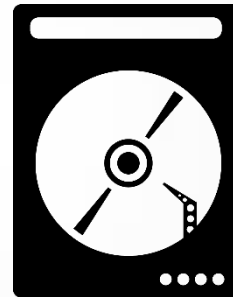
★ DUPLICATE FILES

★ EMAIL ATTACHMENTS

★ PAPER DOCS

★ DATABASES

★ EXTERNAL MEDIA




OUR SOLUTION



saving DOCUMENTS TO M-FILES


★ SAVE TO THE M: DRIVE

★ FILL OUT PROPERTIES


 DOCUMENT TYPE

 DATE

 CUSTOMER

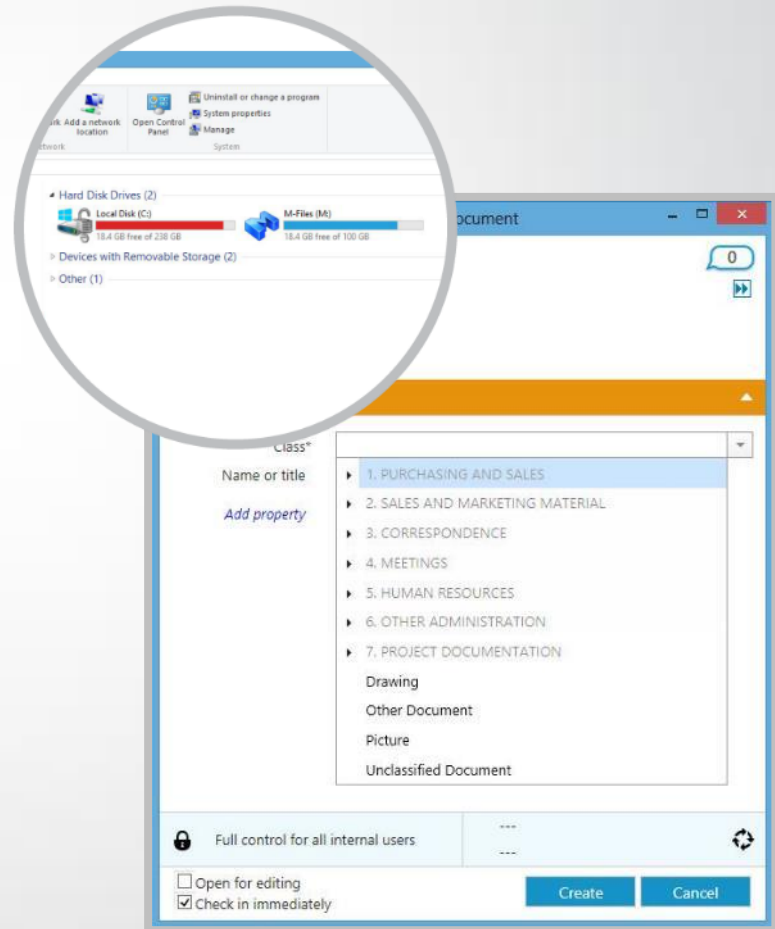
 PROJECT

★ ENJOY THE BENEFITS

 LIGHTNING FAST SEARCH

 **ONE**, ALWAYS UP-TO-DATE DOCUMENT

 OFFLINE AVAILABILITY

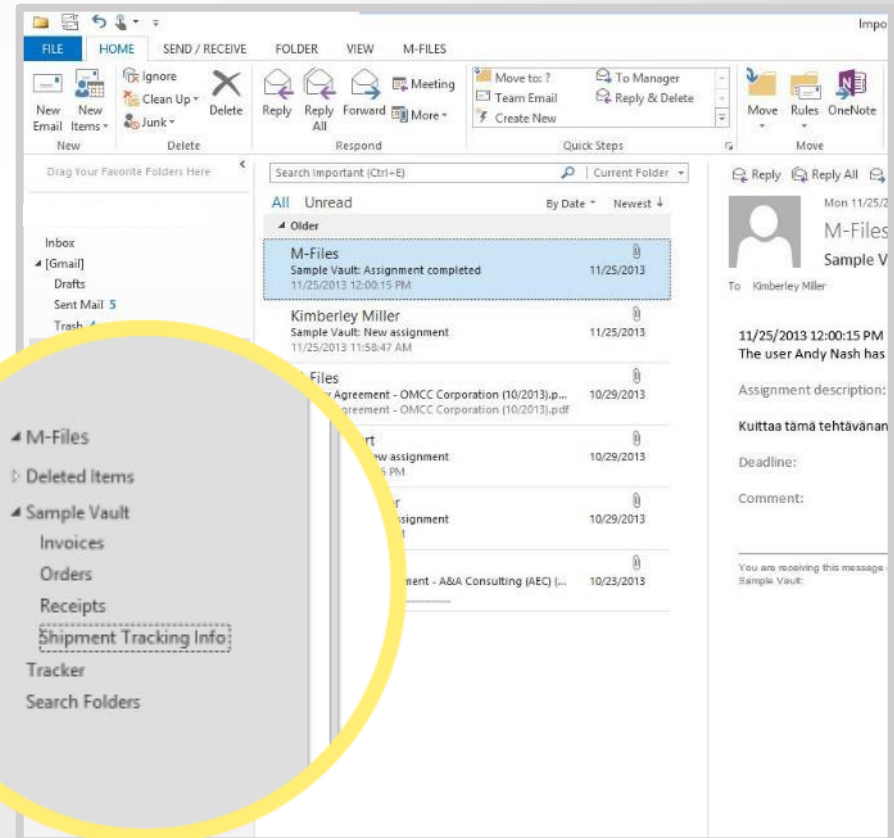


save to the vault DIRECTLY FROM OUTLOOK

★ DRAG-AND-DROP EMAILS & ATTACHMENTS TO M-FILES SMART FOLDERS

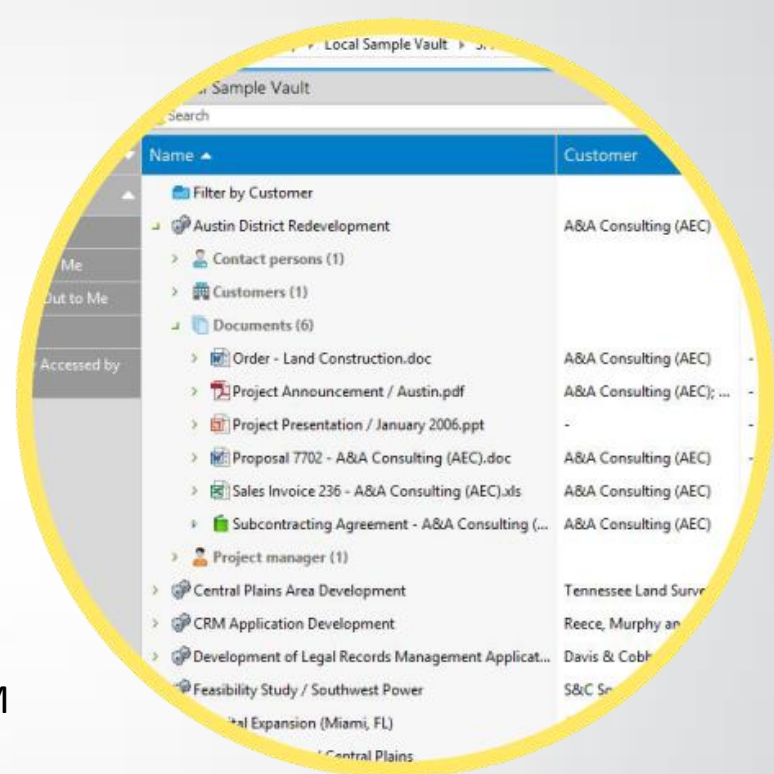
- Smart Folders automatically know **what** it is and **who** it relates to

★ FUNCTIONALITY IS BUILT RIGHT IN TO MICROSOFT OUTLOOK



VIEW YOUR DOCUMENTS & DATA
any way you want to.

- ★ ACCESS TO DOCUMENTS RESEMBLES TRADITIONAL FOLDER DIRECTORIES
 - Easy to use
- ★ DEFINE VIEWS BASED ON DOCUMENT PROPERTIES
 - One document can be found several ways
- ★ VIEWS ARE CENTRALLY MANAGED
- ★ ANYONE CAN CREATE VIEWS SPECIFIC TO THEM



TRADITIONAL FOLDER PITFALLS:

- ★ Files only have **one** location
- ★ **Multiple copies** of files may be in different locations



view it ANY WAY YOU WANT TO

- ★ USE DYNAMIC VIEWS TO VIEW & ORGANIZE CONTENT
- ★ VIEWS ARE AUTOMATICALLY UPDATED WITH ANY CHANGES



BY PROJECT



BY CUSTOMER



BY PROJECT AND DOC CLASS



PROPOSAL



A&A CONSULTING



AUSTIN DISTRICT REDEVELOPMENT



view it ANY WAY YOU WANT TO

- ★ USE DYNAMIC VIEWS TO VIEW & ORGANIZE CONTENT
- ★ VIEWS ARE AUTOMATICALLY UPDATED WITH ANY CHANGES



BY PROJECT



BY CUSTOMER



BY PROJECT AND DOC CLASS



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BY PROJECT



BY CUSTOMER



BY PROJECT AND DOC CLASS



PROPOSAL



A&A CONSULTING



AUSTIN DISTRICT REDEVELOPMENT



powerful SEARCH

find DOCUMENTS INSTANTLY

★ SEARCH RESULTS ARE RANKED BY RELEVANCY

- How recently the document was created
- How many times the document has been edited or updated

★ SEARCH INCLUDES FILE METADATA & CONTENTS

★ LOCATES DOCUMENTS QUICKLY NO MATTER HOW MANY ITEMS ARE IN THE VAULT

Name	Score ▼
▲ Documents (50+) Show more results	
▶ Invitation to Project Meeting 2/2007	82501
▶ Order - Logo Design	82501
▶ Invitation to Project Meeting 1/2006	81443
▶ Job Application, Pam Ryder	81443
▶ Minutes / Project Meeting 1/2007	81443
▶ Invitation to General Meeting 2004	81348
> Request for Proposal - Power Line #2.doc	46517
Request for Proposal - NDA Template.doc	45582
White paper - Metadata (text).doc	44354
> Job Application, Jonathan Lockhart.doc	44338
▶ Training Plan	44083
▶ Project Plan	43309
Request for Proposal - Job Application, Thomas Westwood.doc	43168
> Power Line Test Results.doc	42930
> Request for Proposal - Graphical Design.doc	42694
> Invitation to Project Meeting 1/2004.doc	42501
> Invitation to Project Meeting 1/2006.doc	42501
> Invitation to Project Meeting 1/2007.doc	42501
Invitation to Project Meeting 2/2004.doc	42501
Invitation to Project Meeting 2/2007.doc	42501
Minutes / ESTT Project Meeting 1/2007.doc	42501
Minutes / ESTT Project Meeting 2/2007.doc	42501

edit WITHOUT FEAR OF DUPLICATION

★ CHECK OUT DOCUMENT TO EDIT

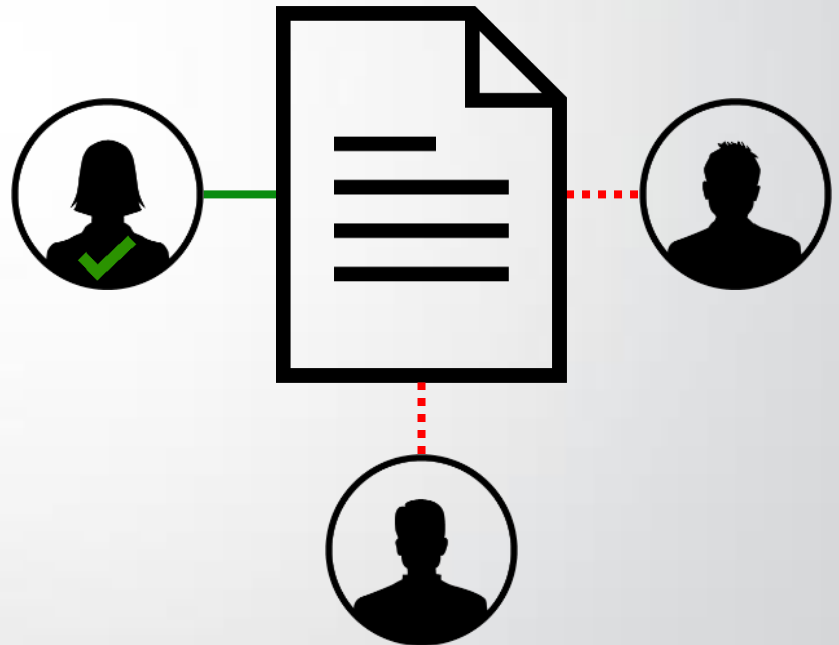
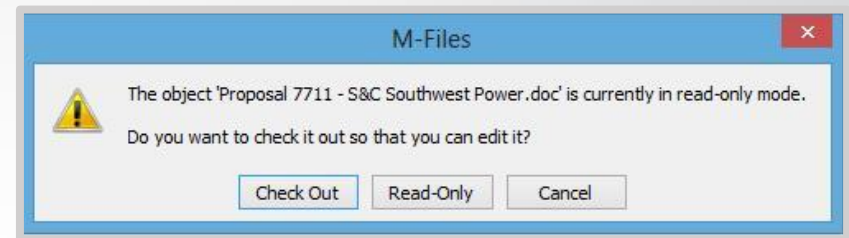
- Reserves the document for editing
- Prevents others from editing at the same time
- Others are still able to read checked out docs

★ CHECK IN DOCUMENT WHEN DONE

- Once checked in, others can edit the document

★ CO-AUTHORING

- Simultaneously edit shared documents
- Collaborate with co-workers and outside parties
- See who has made changes and what they are



keep track OF ALL CHANGES

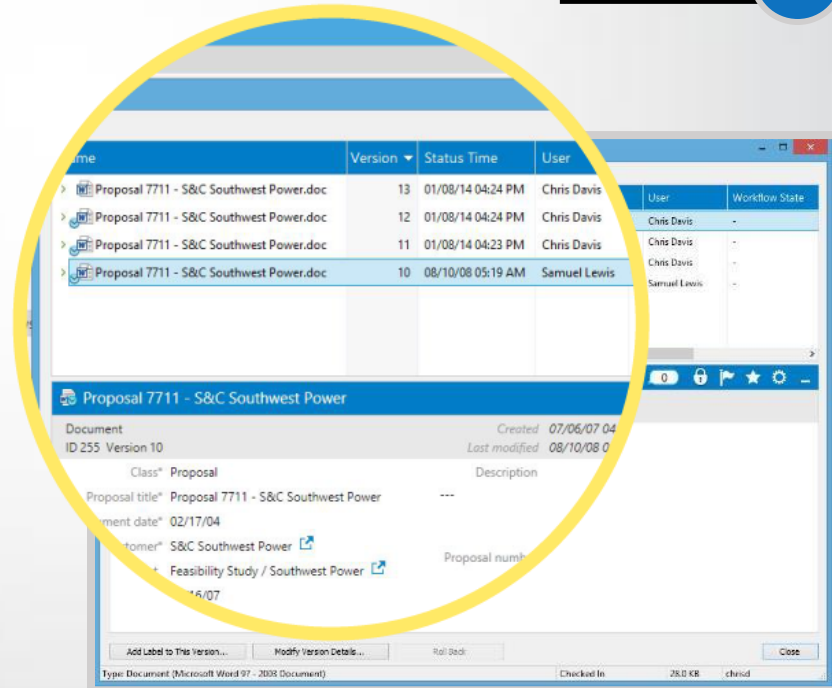
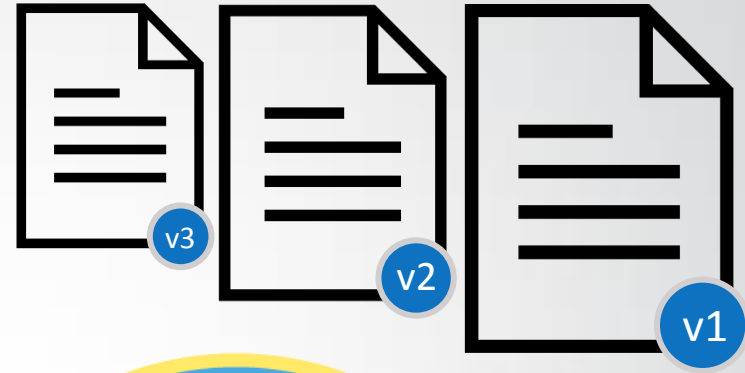
★ HISTORY IS AUTOMATICALLY DOCUMENTED

★ VIEW PREVIOUS VERSIONS ANY TIME

- Eliminates the risk of accidental data loss
- Traceability ensures quality standard compliance in regulated industries

★ EFFICIENT USE OF HARD DISK SPACE

- Only "delta" changes are stored



welcome TO THE INDUSTRY'S
MOST ADVANCED PERMISSION MANAGEMENT

★ USER & USER GROUP RIGHTS

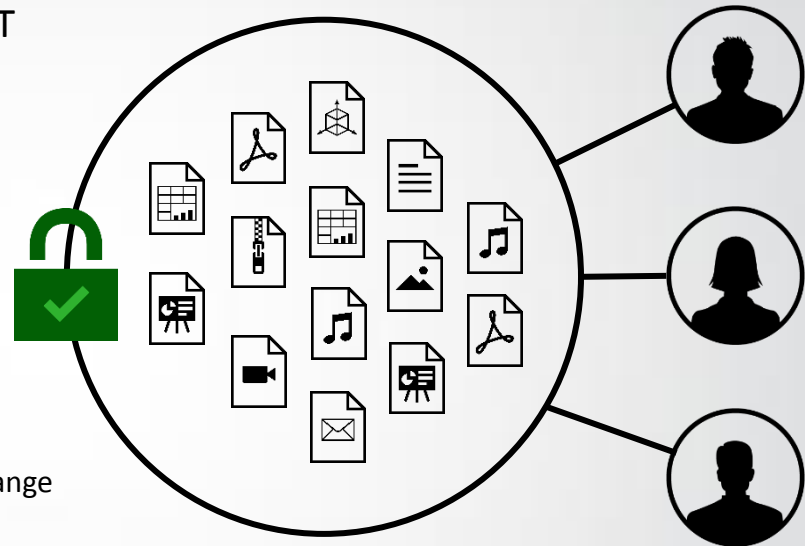
- Per Document
- Per Document Class

★ METADATA-DRIVEN PERMISSIONS

- Enables automatic changes to access permissions with any change in metadata, such as when a document is approved or project team members change

★ SIMPLE SETUP & ADMINISTRATION

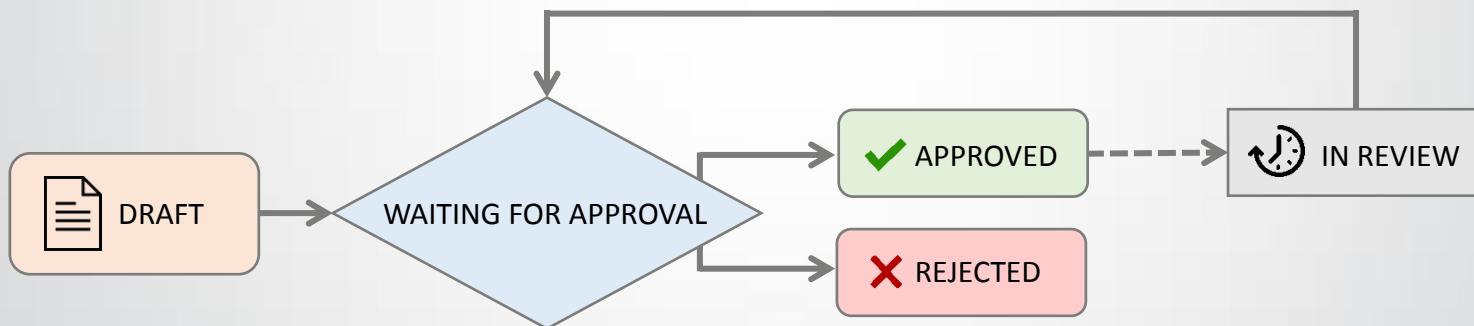
★ ACTIVE DIRECTORY SUPPORT



flexible, compliant WORKFLOWS

★ AUTOMATE BUSINESS PROCESSES

★ HERE'S AN EXAMPLE: **STANDARD OPERATING PROCEDURE**



COMPLIANCE



APPROVAL STATES

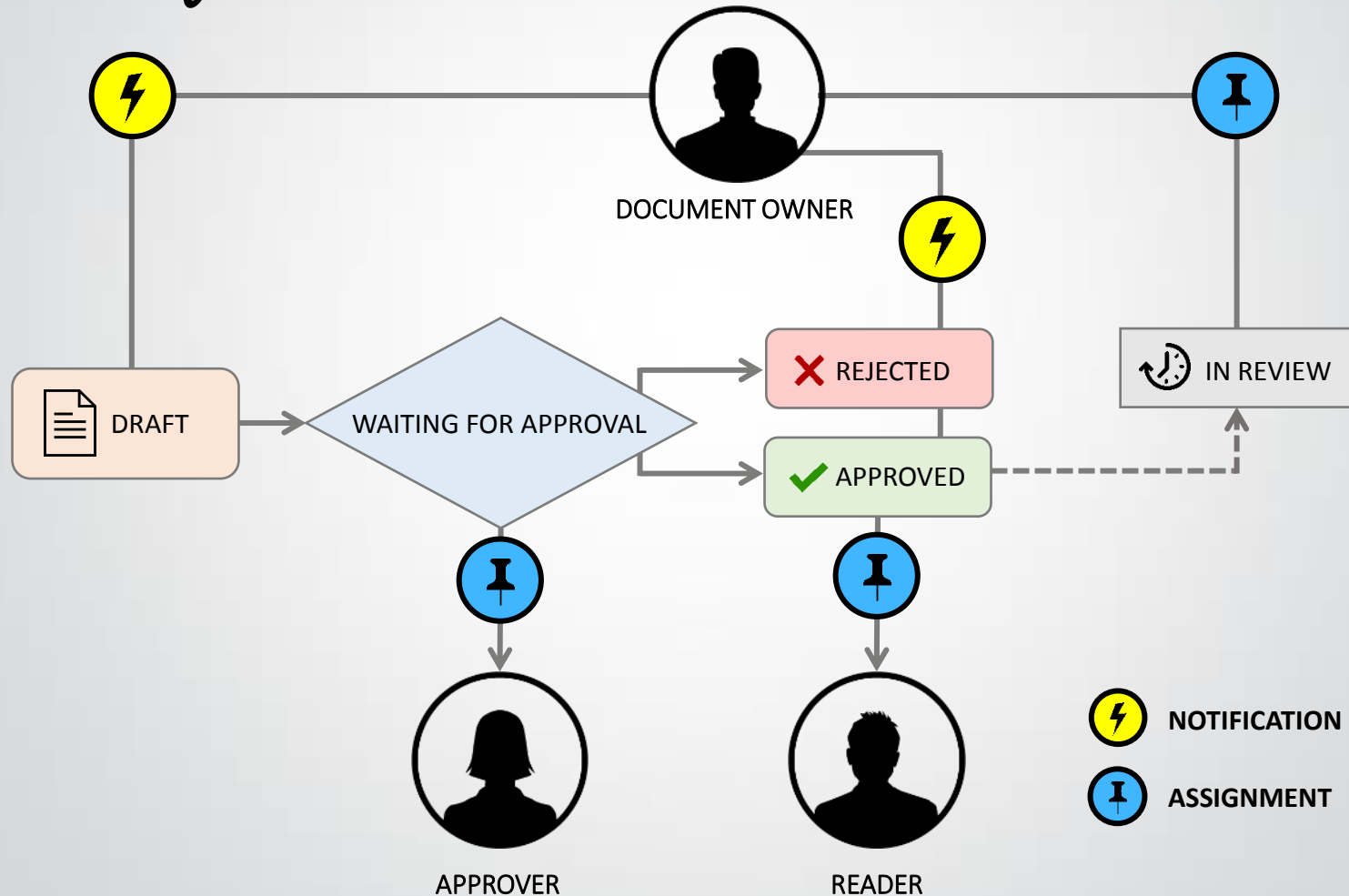


REGULAR REVIEW

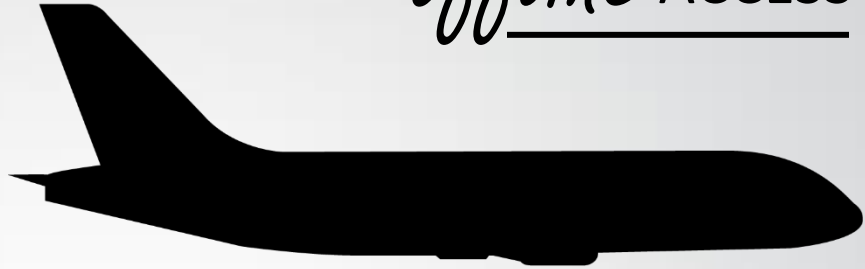


PERMISSIONS

get notified ABOUT IMPORTANT TASKS & ASSIGNMENTS



offline ≠ DISCONNECTED

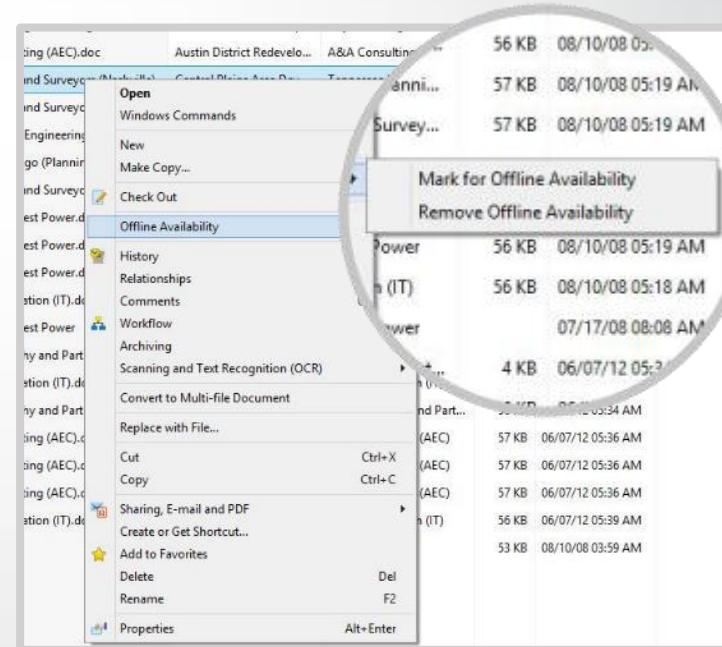
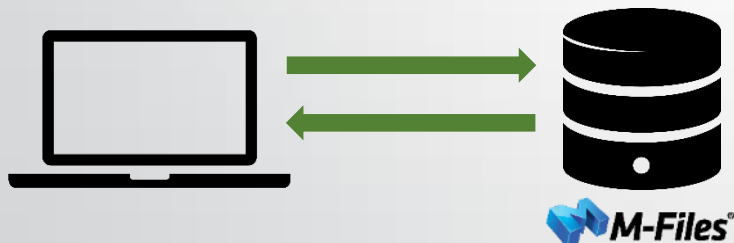


★ DYNAMIC SYNCHRONIZATION

- Sync **only the content you need** offline
 - **Recent Documents**
 - All documents from a certain **Customer**
 - Documents related to a specific **Project**

★ VAULT IS UPDATED AS SOON AS YOU'RE BACK ONLINE

★ SYNCHRONIZATION IS FAST EVEN OVER SLOW INTERNET CONNECTIONS



vault access VIA THE BROWSER OF YOUR CHOICE



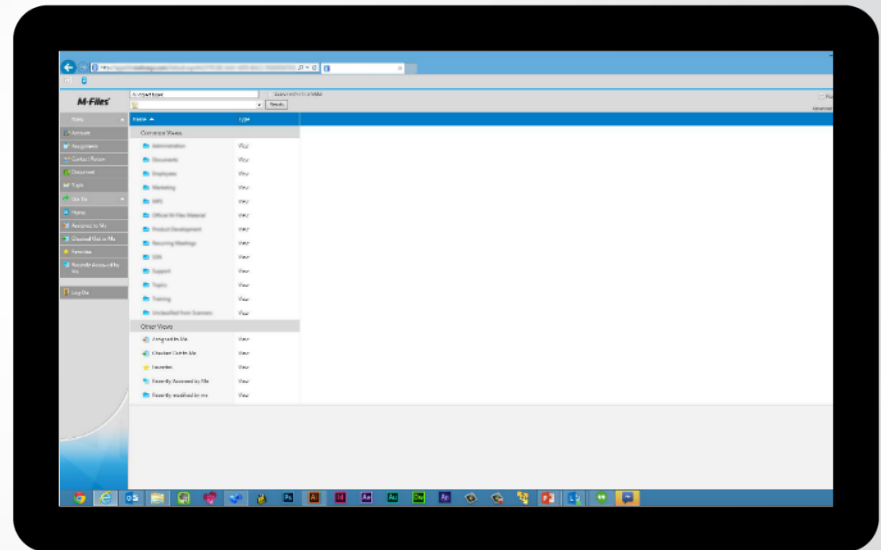
★ USER INTERFACE IS ALMOST IDENTICAL
TO THE WINDOWS CLIENT

★ ACCESS FOR EXTERNAL PARTIES

- Customers
- Subcontractors
- Public Internet Users

★ ACCESS FROM ANY PLATFORM

- Windows
- Mac
- Linux



access EVERYWHERE

★ MOBILE APPS FOR MOST DEVICES

- iPhone/iPad
- Android devices
- Windows Phone

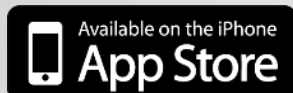
★ VIEW DOCUMENTS

★ MANAGE WORKFLOWS

★ E-SIGNATURES



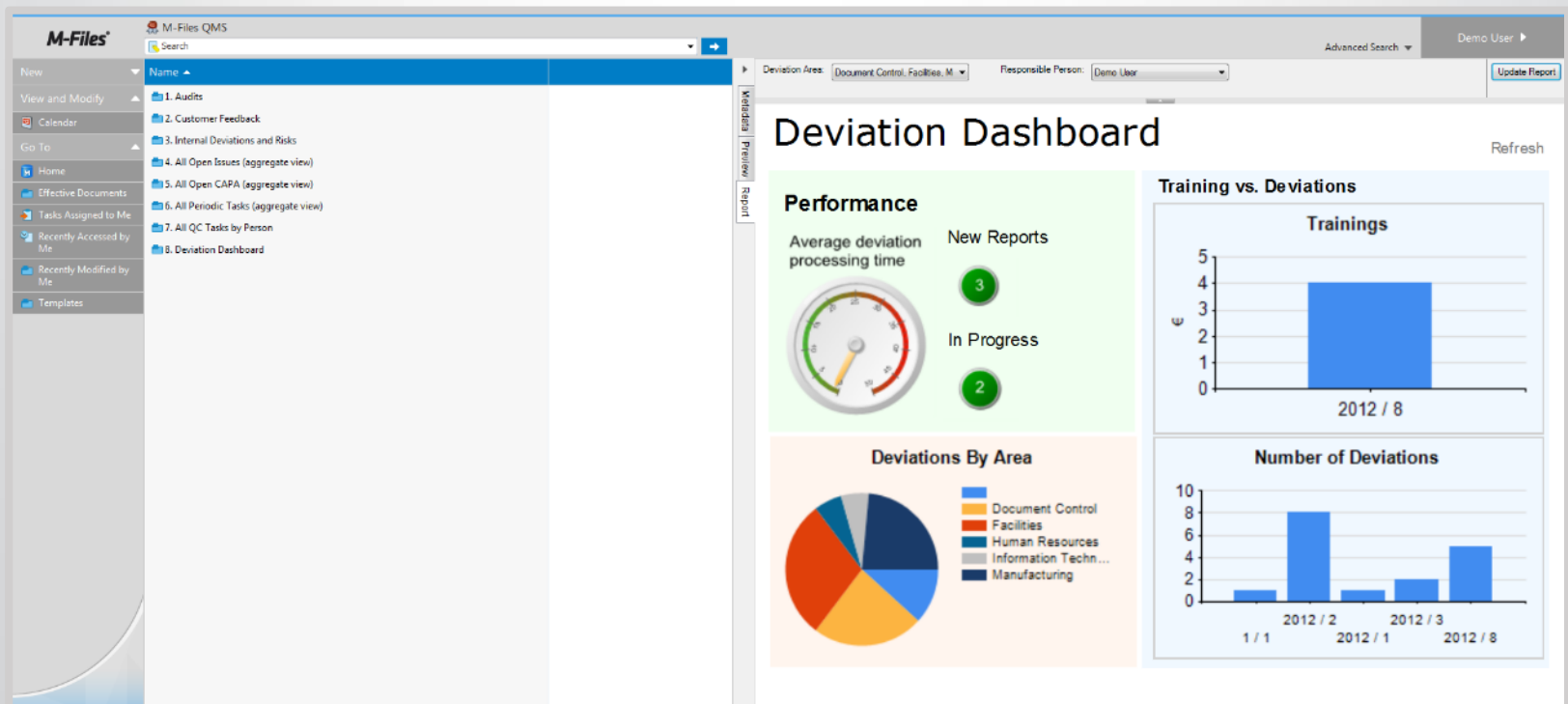
INSTALL THE APPS **NOW** FROM:



ADVANCED FEATURES



- ★ PROVIDES INSIGHT INTO BUSINESS OPERATIONS
- ★ CALCULATES & DISPLAYS STATISTICAL DATA ABOUT VAULT CONTENTS
- ★ PROVIDES ANALYTICS TO AID IN DECISION MAKING
- ★ SUPPORTS EXTERNAL CONTENT FROM CRM AND ERP SYSTEMS



keep track OF ALL CHANGES

★ SUPPORTS COMPLIANCE INITIATIVES

- FDA 21 CFR Part 11
- EU GMP Annex 11
- ISO 9000/9001
- Good Manufacturing Practice (GMP)

★ SOME TARGET INDUSTRIES

- Pharmaceutical & Life Sciences
- Healthcare
- Manufacturing
- Aviation
- Mining
- Petrochemical
- Food Production

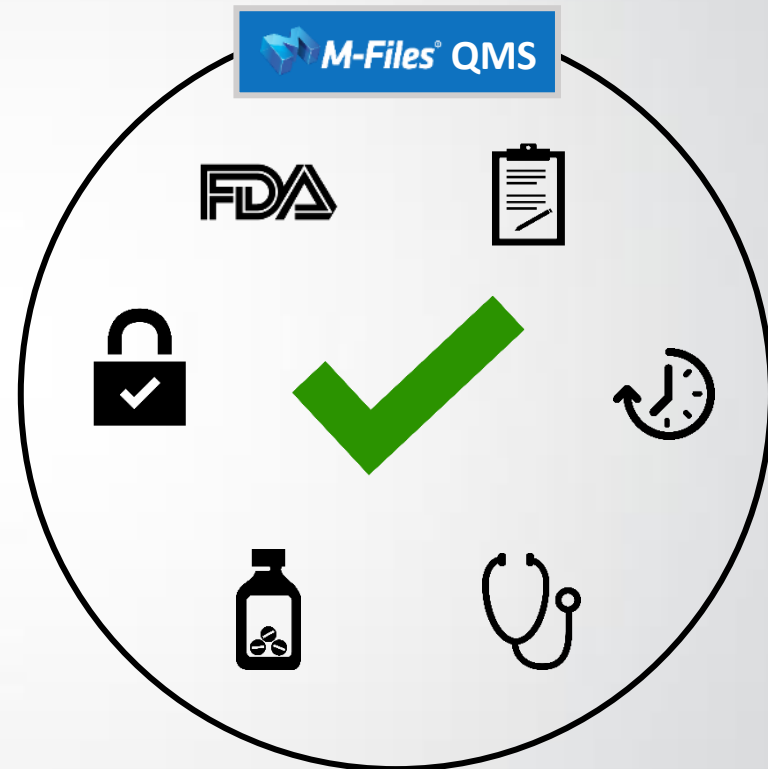
★ TIME-STAMPED LOG & AUDIT TRAIL

★ COMPREHENSIVE VERSION HISTORY

★ MANDATORY WORKFLOWS

★ SUPPORT FOR E-SIGNATURES

★ STRICT ACCESS CONTROL



paperless INTELLIGENCE →

★ **CAPTURE** PAPER DOCUMENTS WITH EXISTING SCANNERS & MULTI-FUNCTION DEVICES

- TWAIN & WIA Scanners Supported

★ **SEARCH** CONTENT WITHIN SCANNED DOCUMENTS

- Zone OCR enables automatic metadata tagging
 - Text, Barcodes, QR Codes

★ **BENEFIT** FROM UNIQUE M-FILES FEATURES

- Access in Dynamic Views
- Automatic Permissions
- Workflow Integration



PAPER DOC



SCANNED



CHARACTER RECOGNITION (OCR)



SAVED IN M-FILES



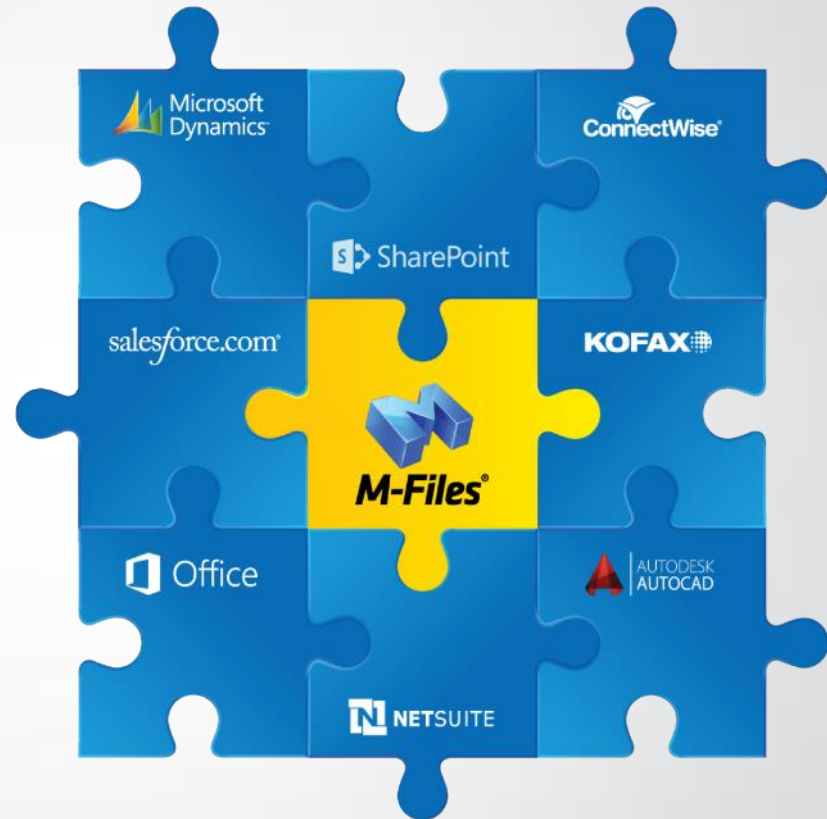
integrating THIRD PARTY SOFTWARE

we play nice WITH OTHERS

★ M-FILES INTEGRATES WITH:

- Microsoft Dynamics
- Microsoft Sharepoint
- Microsoft Office
- Salesforce
- NetSuite
- ConnectWise
- Autotask
- Autodesk (AutoCAD & Revit)
- Kofax Express
- PSIGEN

★ THE M-FILES API CONNECTS TO
VIRTUALLY **ANY DATABASE**



Microsoft Dynamics CRM

File Accounts View Charts Add Customize

New Edit Deactivate Merge Detect Duplicates Send Direct E-mail Add to Marketing List Connect Assign Share Copy a Link E-mail a Link Follow Unfollow Run Workflow Start Dialog Run Report Import Data Filter Export to Excel Advanced Find New Document Show Documents M-Files

Records Collaborate Process Data M-Files

Workplace

My Work

- What's New
- Dashboards
- Activities
- Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements

Customers

- Accounts
- Contacts

Get Started with Accounts

An account is a company or corporation that you do business with.

1. Import
 - Import from Files
 - About Importing
2. Use
 - About Quick Campaigns
 - Detect Duplicates
 - About Sharing & Assigning
3. Modify & Manage
 - Create Custom Views
 - Set Up Duplicate Detection
 - Customize Accounts

Overview Video

Accounts Search Results

Account Name	Account Number	Primary Contact	Address 1: City	Main Phone	E-mail
ESTT Corporation			New York	123.456.7890	

Order - Graphical Design

Document ID 442 Version 1

Created: 6/7/2012 5:58 AM Andy Nash
Last modified: 6/7/2012 5:58 AM Andy Nash

Class:* Order Description: ---

Name or title:* Order - Graphical Design

Document date:* 11/10/2004 Add property

Customer:* ESTT Corporation (IT) Workflow: ---

Project: Redesign of ESTT Marketing M. Workflow State: ---

Keywords: ---

Metadata

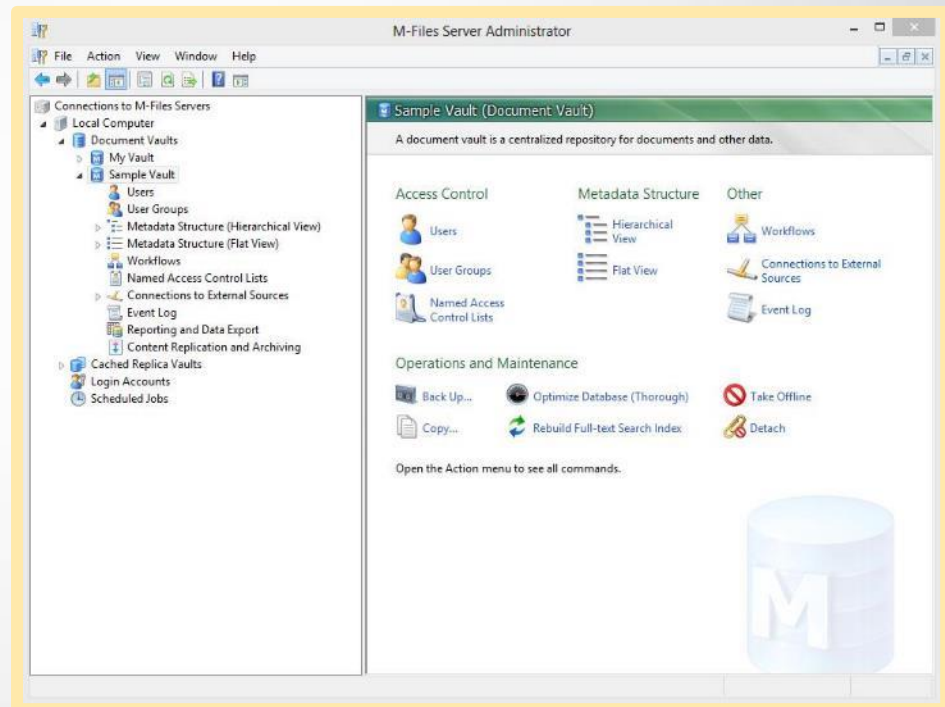
1 - 1 of 1 (1 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

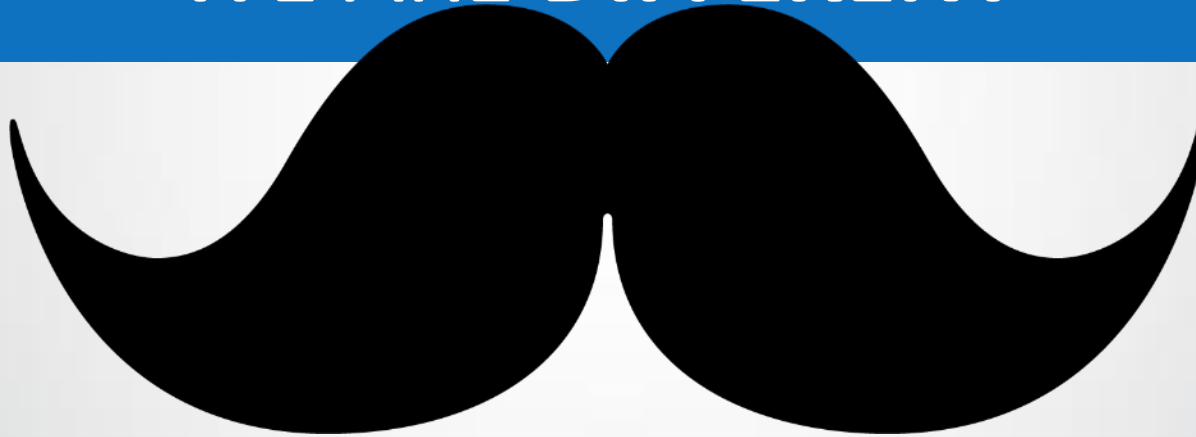
manage everything WITH EASE

★ THE VAULT STRUCTURE IS EASY TO
MANAGE & EDIT

- Users and User Groups
- Permissions & Access Privileges
- Document Classification Structure
- External data
- Workflows
- Backups
- Archiving
- Event log



WE ARE DIFFERENT



what's DIFFERENT?



METADATA-DRIVEN (WHAT VS. WHERE)



FLEXIBLE DEPLOYMENT: CLOUD, ON-PREMISE, HYBRID



SIMPLE, YET HIGHLY CONFIGURABLE ECM



INSTANTLY FAMILIAR (INTEGRATED IN TO WINDOWS)



INTEGRATES WELL WITH OTHER SOFTWARE



ACCESSIBILITY ON EVERY DEVICE

ORGANIZATIONAL BENEFITS



the BENEFITS

 ORGANIZE EVERYTHING BY **WHAT** IT IS

 FIND WHAT YOU'RE LOOKING FOR

 IMPROVE SECURITY

 SHARE & COLLABORATE

 STAY COMPLIANT

flexible DEPLOYMENT



CLOUD



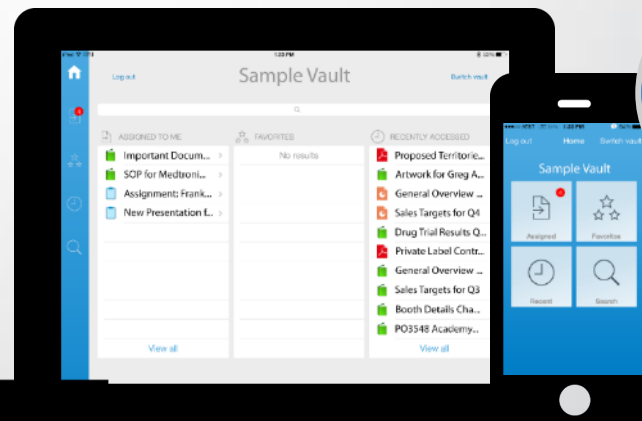
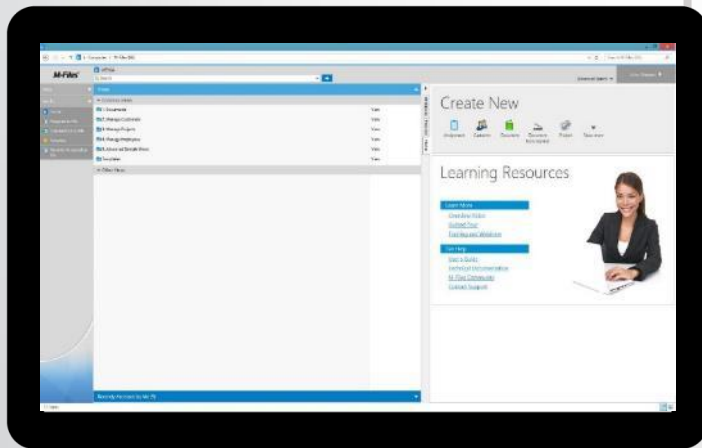
ON-PREMISE



HYBRID

3

OPTIONS




1

EXPERIENCE

watch these videos TO LEARN MORE ABOUT M-FILES

★ OUR GUIDED TOUR VIDEO SERIES SHOWS HOW EASY IT IS TO USE M-FILES

www.M-Files.com/GuidedTour 



SAVING DOCUMENTS



SEARCHING



DYNAMIC VIEWS



EDITING DOCUMENTS

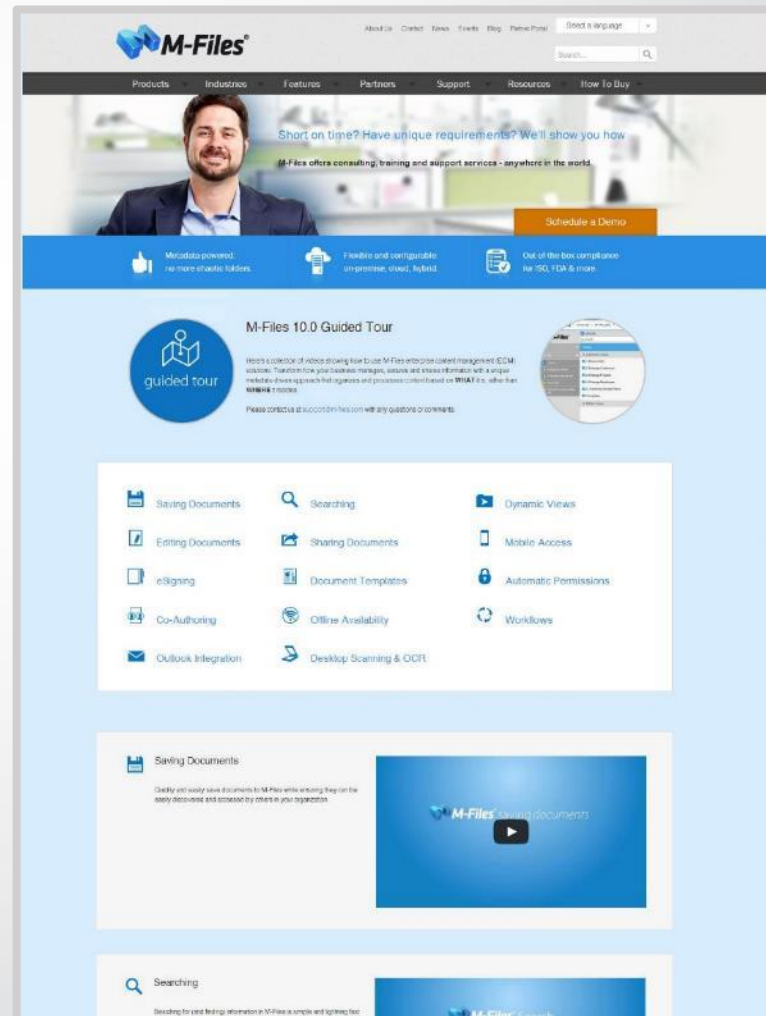


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