

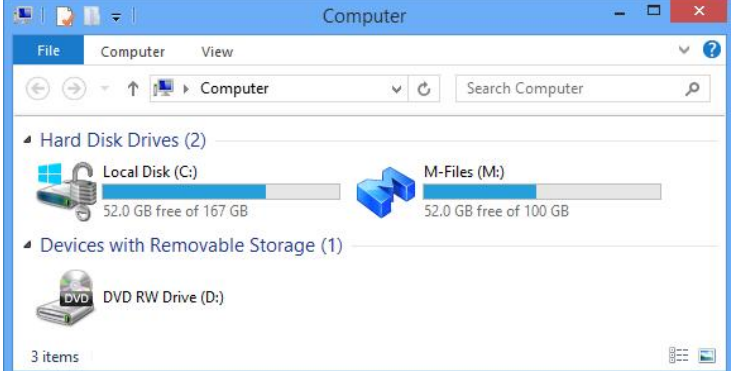


Getting started with M-Files Client Software

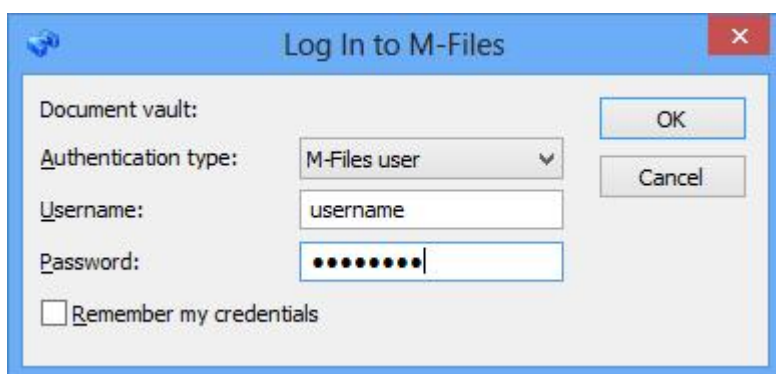
This guide helps you to get up to speed with M-Files Client software. You can use the client software to access on-premise and cloud based M-Files servers.

Getting started

After successful installation of M-Files Client, a new virtual disk drive is added onto user's Windows system. You can access M-Files vaults via either:

The shortcut link on the desktop	
The M icon on the notification area	
Windows Explorer (The M drive)	

Depending on your setup, you may need to provide M-Files specific credentials to login:



The dialog box titled "Log In to M-Files" contains the following fields and controls:

- Document vault:** (Label)
- Authentication type:** A dropdown menu currently showing "M-Files user".
- Username:** A text input field containing the text "username".
- Password:** A text input field with masked characters (dots).
- Remember my credentials:** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons are located on the right side.

Log In to M-Files with the username and password

M-Files terminology

Get acquainted with the following terms to easier follow this getting started guide.

<div><div><div>1. Docs By Class</div><div>2. Docs by Company</div><div>3. Docs by Tag</div><div>Manage Company Details</div></div></div>	<p>Views are locations in which the documents and other objects are listed based on the metadata they contain.</p>
<div><div><div><div></div><div>Request for Proposal - Graphical Design.doc</div></div></div></div>	<p>Files can be converted to documents or attached to objects in M-Files (see the definition of document below)</p>
<div><div><div><div><div>Request for Proposal - Graphical Design.doc</div><div><div><div><div>Request for Proposal - Graphical Design</div><div>Document ID 296 Version 5</div><div>Created 7/6/2007 3:39 AM Tina Smith Last modified 6/7/2012 4:35 AM Andy Nash</div></div><div><div><div>Class* Request for Proposal</div><div>Name or title* Request for Proposal - Graphical Design</div><div>Document date* 11/10/2004</div><div>Customer* ESTT Corporation (IT)</div><div>Project Redesign of ESTT Marketing Material</div><div>Keywords ---</div><div>Description ---</div></div><div>Add property</div><div><div>Full control for all internal users</div><div></div></div><div>Close</div></div></div></div></div></div></div></div>	<p>Metadata is additional information about the object or document in M-Files. All documents in M-Files have metadata.</p>
<div><div><div><div><div>Project Agreement - Reece, Murphy and Partners (11/2004)</div><div>Original.doc</div><div>Signed.pdf</div></div></div></div></div>	<p>Multi-file document: documents can consist of multiple files. In Multi-file documents, all document files have common metadata.</p>

A&A Consulting (AEC)

0

Customer

ID 145 Version 12

Created 7/12/2006 4:35 AM (M-Files Server)

Last modified 6/10/2008 11:25 AM Samuel Lewis

Class* Customer

Customer name* A&A Consulting (AEC)

Address (line 1) 444 Blackwell Road

Address (line 2) 14th Floor

City Miami

State/province FL

ZIP/postal code 33101

Country USA

Telephone number (305) 555-0180

Web site <http://www.m-files.com>

Add property

Contact persons

Full control for all internal users

Close

The term *object* refers to instances of various object types – that is, individual objects created using object types. Typical objects in M-Files are document, customer and project. Document object type is used for saving documents (files) into the system. Customer objects are used to store customer details, such as contact information to the system.

Choose class

Choose class

1. SALES

Invoice or receipt

Message or Memo

Proposal or Quote

Purchase Order

2. MANAGEMENT

Contract or Agreement

HR Document

Plan or schedule

Picture

Other

Class is a mandatory property for all documents and objects in M-Files. With the class selection the user roughly describes the document type.

Name or title:

Date:

Company:

Tag:

Description:

2. 6.2010

*

*

*

*

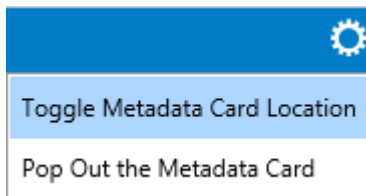
Documents are described in more detail with *Properties*. The properties are class-specific: agreements, for instance, can have expiry date whereas HR documents are often associated with employees. The required properties are marked with an asterisk (*).

M-Files User Interface

M-Files User Interface is similar to Windows Explorer. The layout may vary a bit depending on the Windows version.

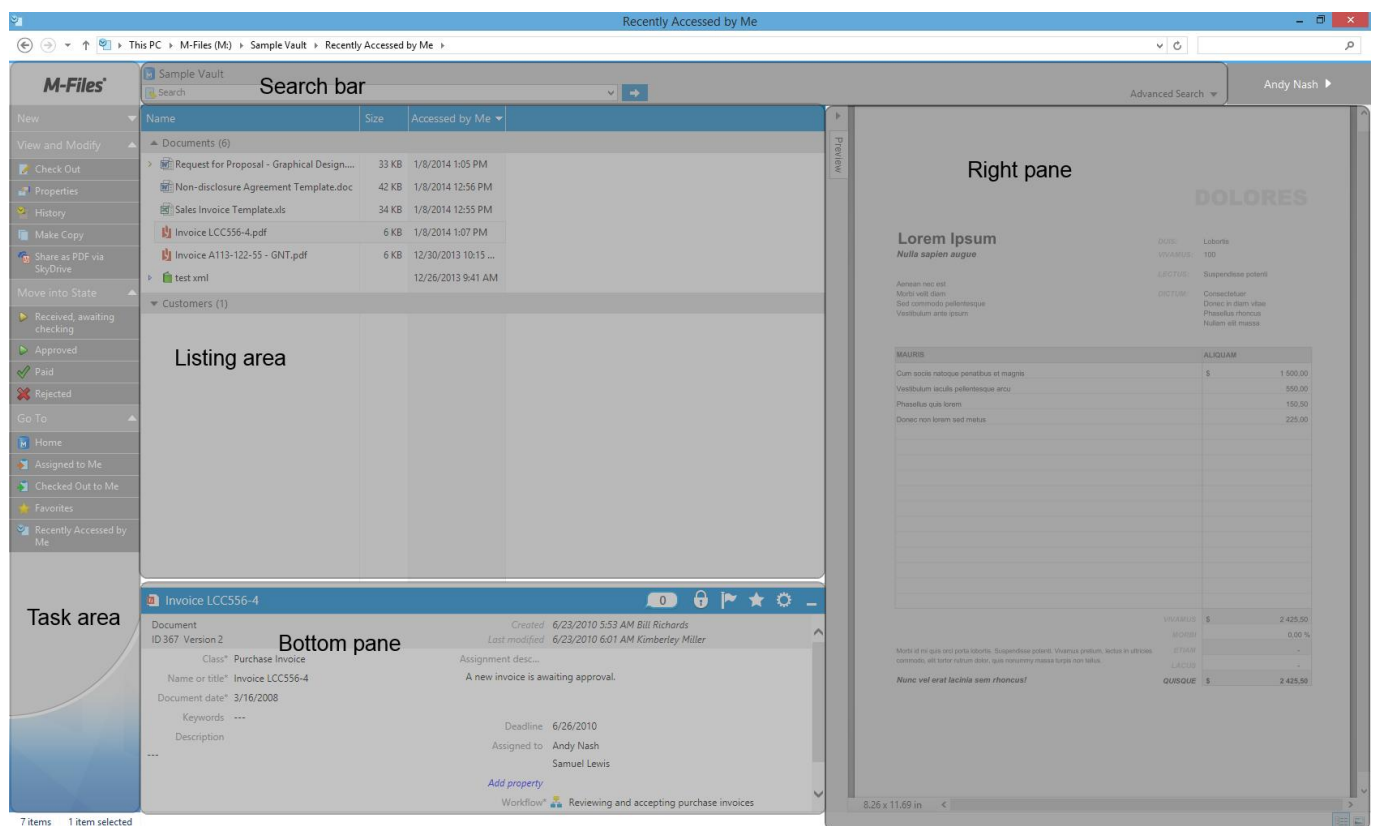
Task area shows the shortcut buttons to the frequently needed features.

Bottom pane can show the metadata of the selected document or other object. You can also toggle the metadata can to the right pane by pressing the wheel icon on the top of the metadata card:

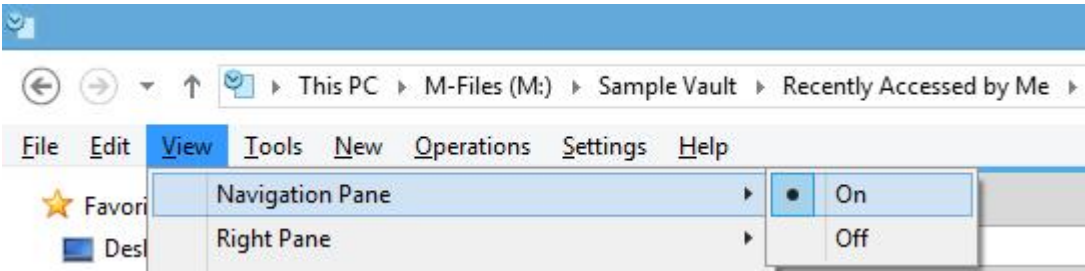


Right pane can be used to preview the selected file. You can also show the metadata card on the right pane.

Search bar has the features to quickly search for the documents and other objects in M-Files.



In addition to the components, you can also view the Navigation pane (Windows Explorer). To show the navigation pane, pop up the menu with the Alt key and select View → Navigation Pane → On:

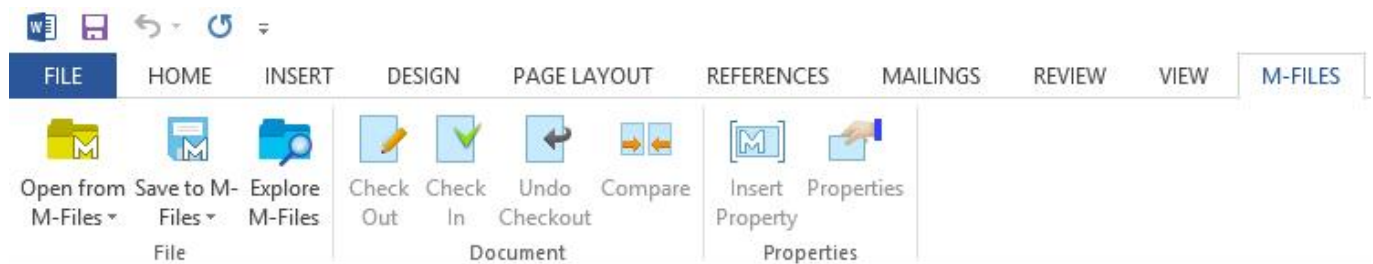


Saving documents

M-Files supports all file types and you can save documents from any application to M-Files. All the documents are saved into the document vault and described with metadata. Users do not have to save documents into a particular folder or location: M-Files organizes content automatically into all relevant views based on the document metadata.

Saving documents from applications

Some applications, such as AutoCAD, MS Word, Excel and PowerPoint have Save to M-Files feature in the M-Files ribbon:



If you use the *Save to M-Files* feature, the document is stored into M-Files and the metadata card is shown to the user:

New Document

(automatic)

Microsoft Word Document (.docx)

0

Save as type* Word document (*.docx)

Class* Proposal

Proposal title* (automatic)

Document date* 1/8/2014

Customer* A&A Consulting (AEC) [\[Link\]](#)

Project Austin District Redevelopment [\[Link\]](#)

Effective through 1/29/2014

Accepted No

Keywords quote, quotation

Description ---

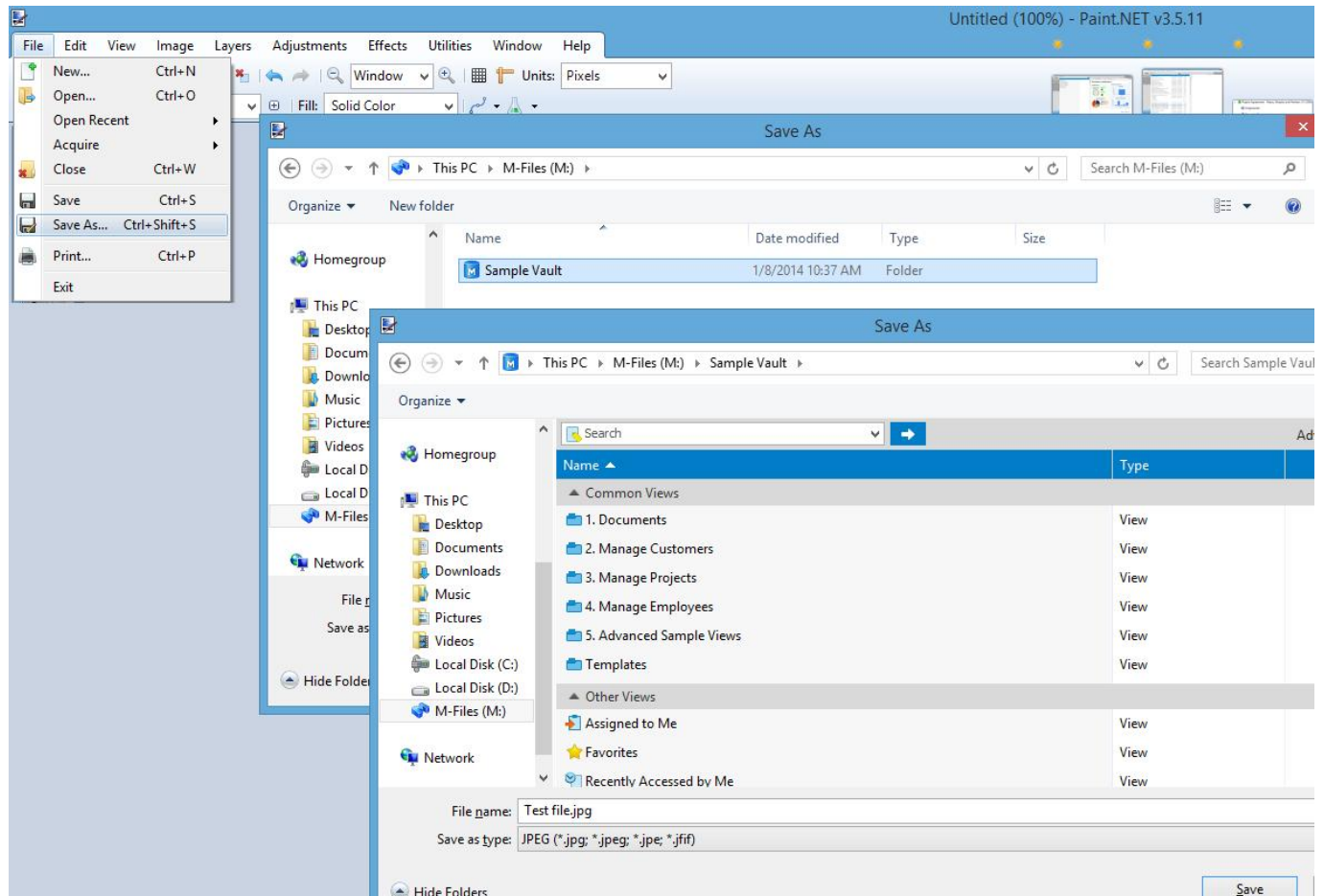
Proposal number* (automatic)

[Add property](#)

Full control for all internal users

Create Cancel

Any application capable to save files in C drive works with M-Files too. If the application does not have *Save to M-Files* feature, choose *Save As...* feature from the File menu and save the file as a new document to the document vault (E.g. M:\Sample Vault\). You do not need to save the file into any view in M-Files; just press the Save button and M-Files will pop up the document card for fill in.



Documents can be saved also into the document vault (e.g. M:\Sample Vault\)

Saving existing files as new documents

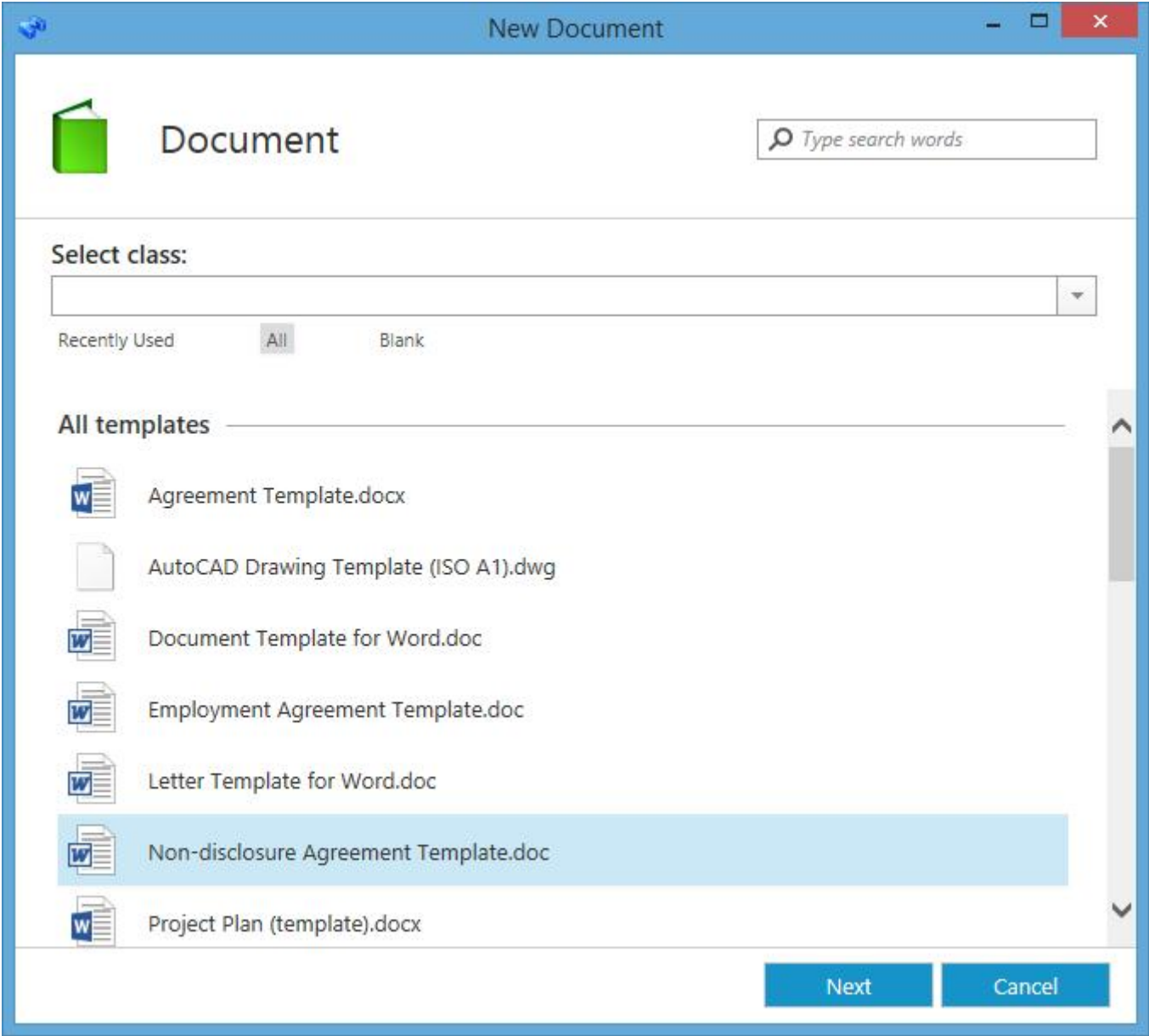
As the applications see M-Files as hard disk in Windows, you can also use the common file operations in Windows, such as copy & paste, drag & drop etc. This makes it easy to save documents to M-Files from the network drive or memory sticks.

Copy the existing file to M-Files as a new document by right-clicking the file and choosing Add to M-Files. M-Files copies the file and pops up the metadata card.

Using M-Files Templates

To create a new document using an existing template, choose New document from task area (Shortcut Ctrl + N).

Then, select the template you want to use and press Next.



New Document

Untitled

From template: Non-disclosure Agreement Template.doc

Class*	Contract or Agreement
Agreement title*	(automatic)
Agreement type*	Non-disclosure agreement
Owner*	Bill Richards
Document date*	1/8/2014
Effective through	---
Customer*	A&A Consulting (AEC)
Contact person	Jeff Smith
Project	Austin District Redevelopment
Keywords	NDA
Description	---

Add property

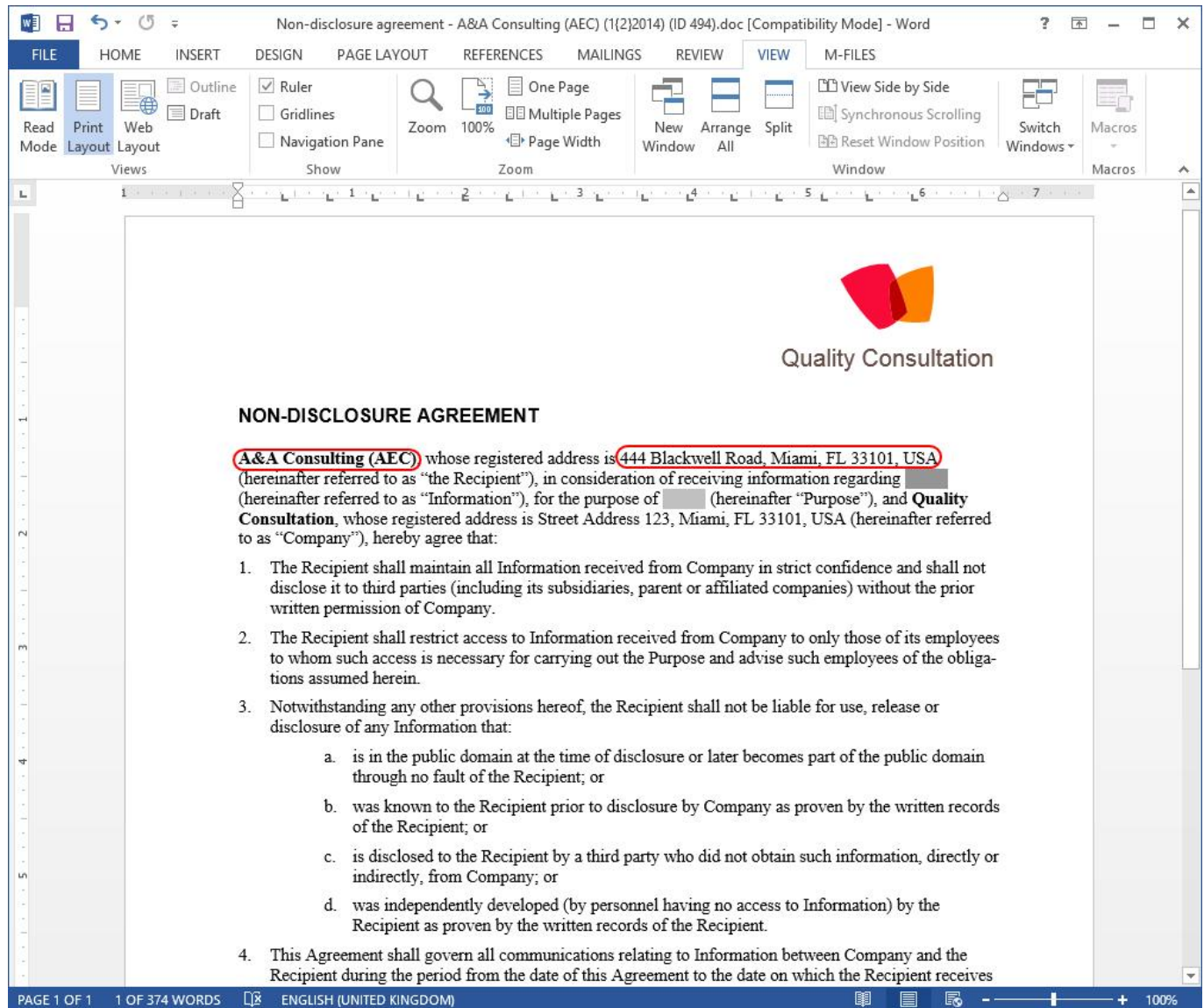
Full control for all internal users

Contract Approval Workflow
 Draft

☒ Open for editing
☐ Check in immediately

CreateCancel

Fill in the empty properties and press *Create*. M-Files then opens up the editor and can automatically fill the template based on specified metadata:



Creating a new template

You can convert any existing file in M-Files to a template:

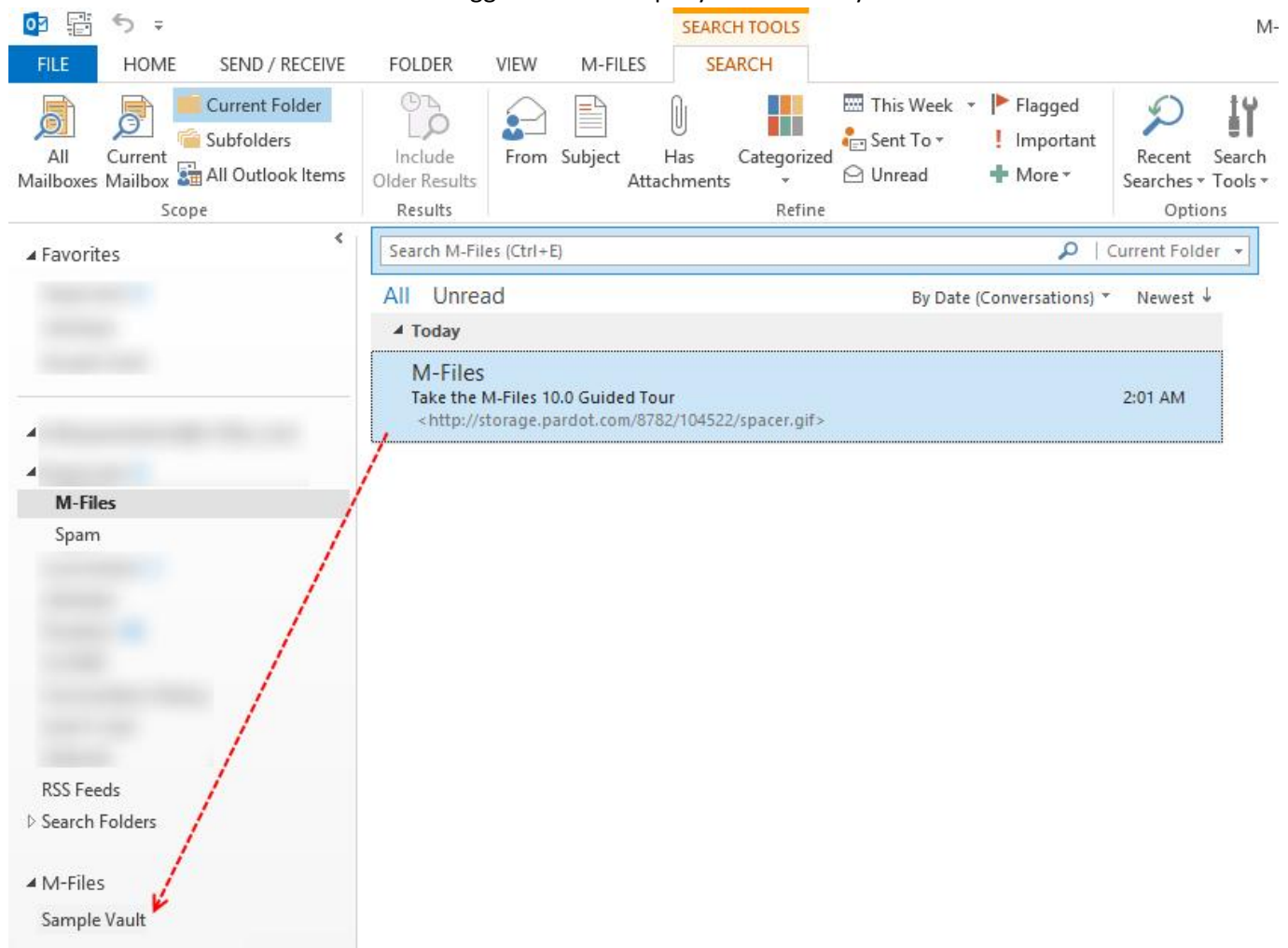
1. Select the document properties
2. Press *More properties...* button
3. Add *Is template* property
4. Set *Is template* property value to *Yes*.

Modify M-Files template by right-clicking the document and choosing *Open*. You can add auto-filled fields to the templates with *Insert Property* feature found in M-Files ribbon. This feature is supported in MS Word, Excel and PowerPoint XP and later.

Saving E-mails from Outlook to M-Files

M-Files creates a folder in Outlook for every document vault. You can save emails with or without attachment files simply by dragging mails into the vault folder. The message is automatically tagged to a correct customer and

contact person in M-Files based on the domain of the sender's email address. If, for example, there is a company *M-Files Inc.* saved into M-Files as a customer object and the e-mail address of the customer is set to pr@m-files.com, all emails from m-files.com domain are tagged to this company automatically.



Drag E-mails into M-Files Vault folders

Metadata tagging

All documents in M-Files are tagged with metadata. The metadata tagging makes it easier to find the documents from the system. Regardless of the way to save documents to M-Files, the metadata card always pops up.

The first metadata property to define is the document class, which roughly defines the type of the document.

Choose class

Choose class

1. SALES

Invoice or receipt

Message or Memo

Proposal or Quote

Purchase Order

2. MANAGEMENT

Contract or Agreement

HR Document

Plan or schedule

Picture

Other

Class selection

Other properties are class-specific and depend on the implementation of your metadata structure.

Search features

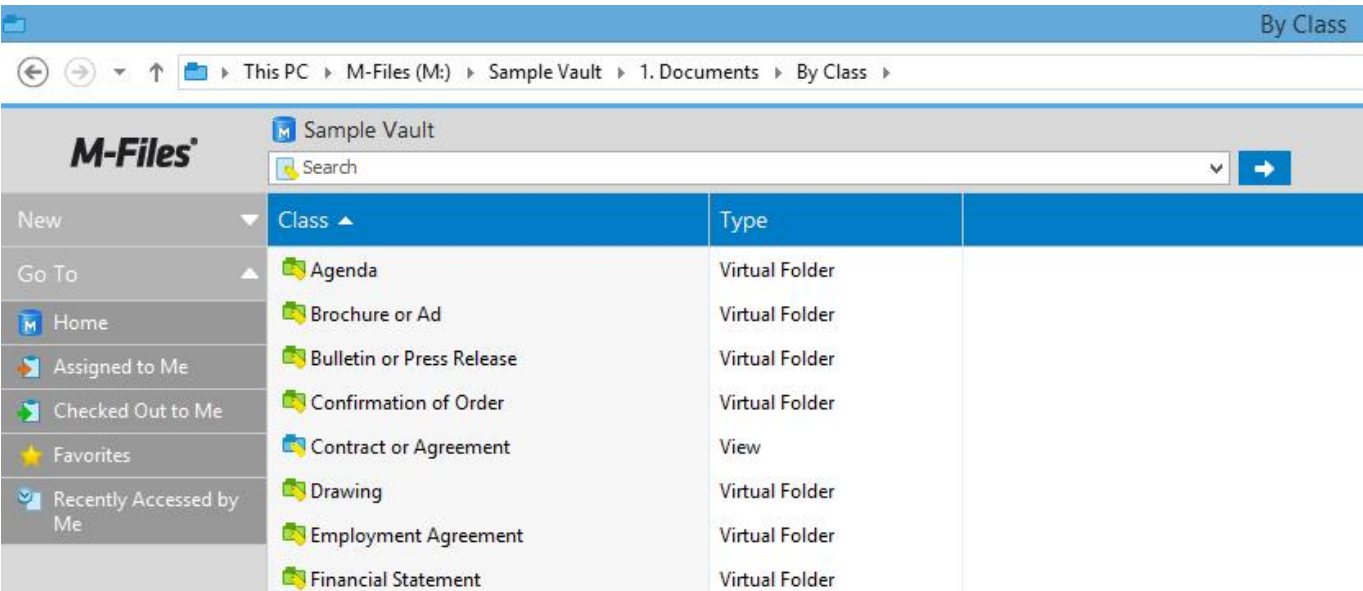
Documents in M-Files can be found using either the search features or dynamic views.

Dynamic Views

View is a folder-like way to organize content in M-Files. The view contents are always based on the document metadata. The view consists of two components:

- Filter defines the criteria documents must fulfill in order to be shown in the view
- Grouping levels define the basis to group the filtered documents within the view

In Documents By Class view, the filter is Object type = Document. Hence, all the documents will be listed in this view regardless of the document class or any other property value. The filtered results (i.e. documents) are grouped by the document class. Hence, M-Files automatically creates a new virtual folder for each document class and groups the documents into correct folders.



Documents By Class view

Search features

M-Files Search is a quick and easy way to find documents from M-Files. Use multiple keywords in your search in order to limit the search results: instead of searching with a word proposal, try *proposal customer name* instead:

Search Results: proposal a&a consulting

This PC > M-Files (M:) > Sample Vault > Latest Searches > Search Results: proposal a&a consulting

M-Files Sample Vault
proposal a&a consulting

Name	Date Created	Date Modified	Score
Documents (11)			
> Proposal 7733 - A&A Consulting (AEC).docx	1/8/2014 1:30 PM	1/8/2014 1:31 PM	130000
> Proposal 7729 - A&A Consulting (AEC).doc	6/7/2012 4:36 AM	6/7/2012 4:36 AM	82501
> Proposal 7730 - A&A Consulting (AEC).doc	6/7/2012 4:36 AM	6/7/2012 4:36 AM	82501
> Proposal 7731 - A&A Consulting (AEC).doc	6/7/2012 4:36 AM	6/7/2012 4:36 AM	82501
> Proposal 7702 - A&A Consulting (AEC).doc	11/9/2004 5:08 AM	8/10/2008 4:19 AM	81300
> Proposal 7705 - A&A Consulting (AEC).doc	11/9/2004 5:13 AM	8/10/2008 4:19 AM	80974
> Proposal 7706 - A&A Consulting (AEC).doc	11/9/2004 5:13 AM	8/10/2008 4:19 AM	80974
> Request for Proposal - HVAC Engineering, Building #1.doc	6/7/2012 4:36 AM	6/7/2012 4:36 AM	29427
> Request for Proposal - Land Construction, Area A.doc	6/7/2012 4:36 AM	6/7/2012 4:36 AM	29427
> Request for Proposal - HVAC Engineering.doc	11/9/2004 5:20 AM	7/9/2007 7:47 AM	28272
> Request for Proposal - Land Construction.doc	11/9/2004 5:16 AM	7/9/2007 7:46 AM	28272

Use multiple search words in order to limit the results

You can use advanced search to refine your search:

Sample Vault
proposal a&a consulting

Advanced Search

Andy Nash

☒ All words ☐ Any word ☐ Boolean

Search all objects ☐ Search within this folder

Reset All Additional Conditions (1)...

Created by is Andy Nash

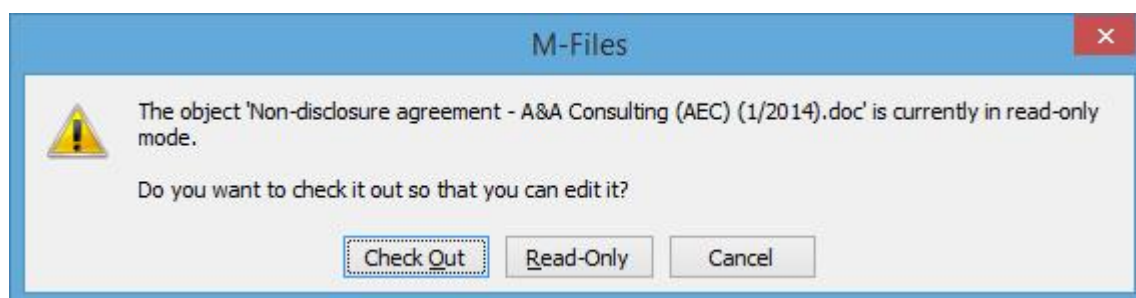
Last modified within the last month

Refine the search if too many results are found

Modifying documents

Modifying documents and other objects is controlled with Check Out/Check In feature: the document must be checked out to the user before it can be modified.

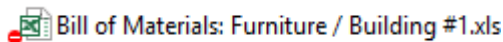
The check out is prompted when double-clicking the file in M-Files:



Check Out reminder

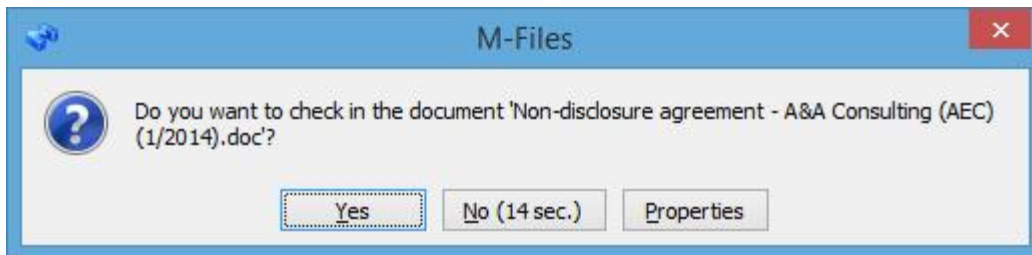
> Non-disclosure agreement - A&A Consulting (AEC) (1/2014).doc

Documents checked out to the current user are highlighted with a green overlay icon



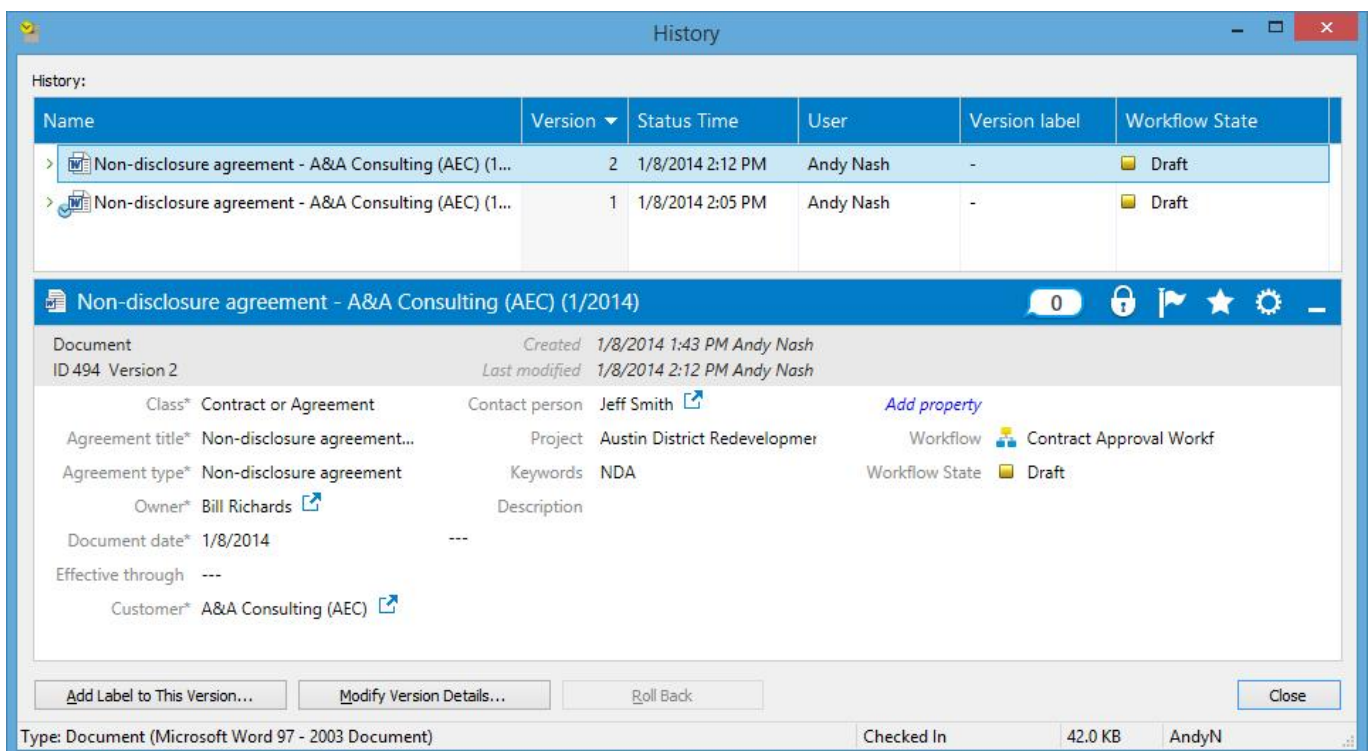
Documents checked out to other user are highlighted with a red overlay icon

When closing the application, check-in reminder pops up. The modifications are saved to M-Files Server only after check-in.



Check-in reminder

The modifications made between the check out and checks in operations are saved as a new version to M-Files. M-Files shows only the latest version of the documents in listings and you can access the previous versions by selecting the document and pressing the History button on the task pane:

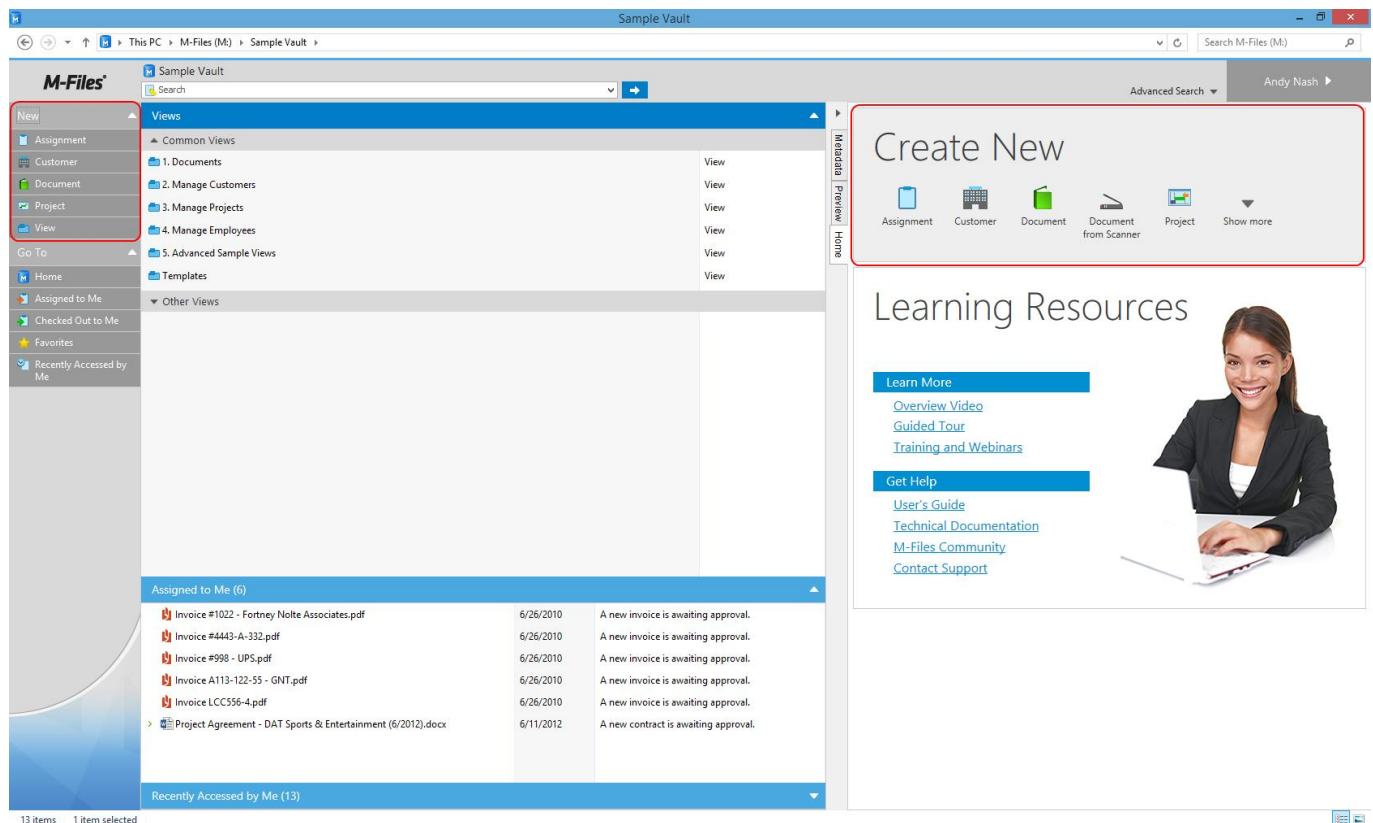


Document history

Other object types

M-Files can manage also other object types besides documents, such as customers, contact persons and projects. Documents can be tagged to these objects using the metadata card and the same document can relate to multiple objects and object types.

You can create new objects from the new menu in the task area or on the right pane.



Offline features

You can access and modify M-Files documents offline too. For efficient synchronization, users can select the documents they wish to be available in offline mode.

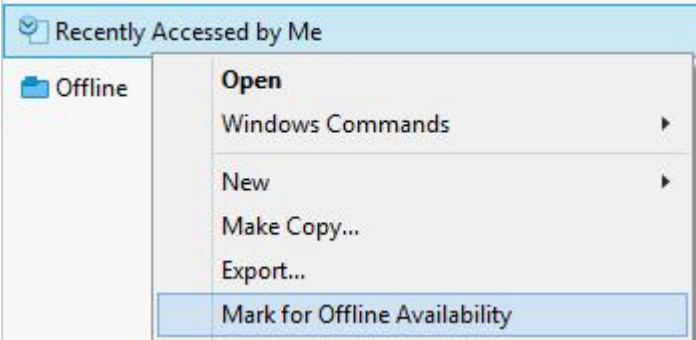
Explicitly setting document available in Offline mode

To mark one document explicitly available in offline mode, select the document and choose feature *Mark for Offline Availability* in *Operations* → *Offline Availability* menu

Offline filters

With offline filters, you can mark documents available in offline mode with criteria. You can, for example, choose to have all those documents you have read or modified within the last 30 days available in offline mode or all documents related to Customer X. This is a dynamic way to define the offline rules: M-Files checks periodically, whether there are new documents fulfilling the criteria and synchronizes those to offline mode too!

Offline filters are easy to create by right-clicking any view in M-Files and choosing the feature *Mark for Offline availability*.

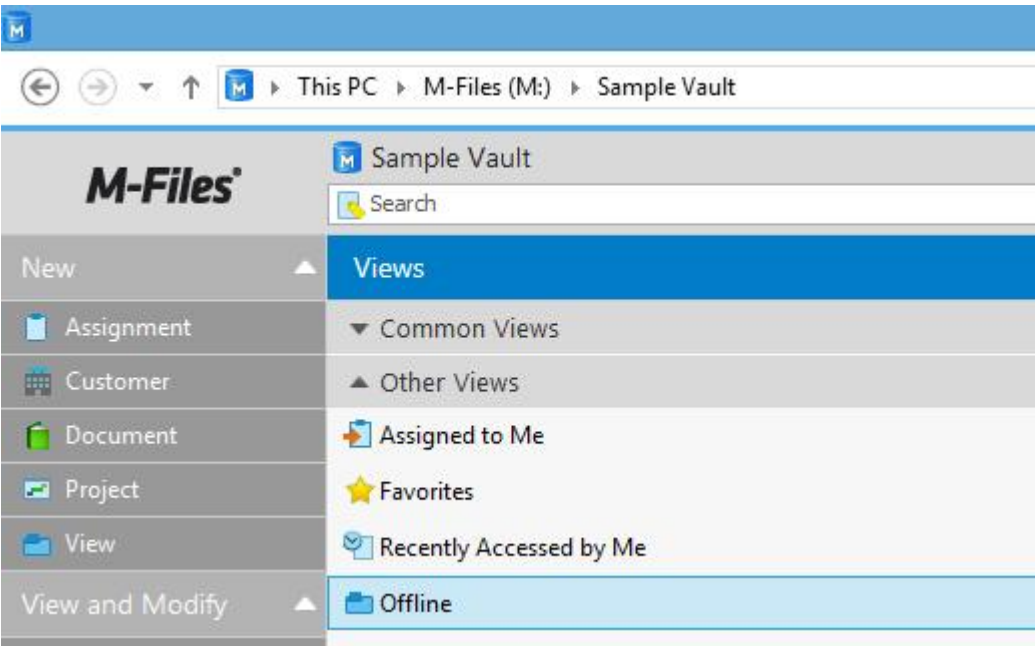


Creating a new offline filter from a view

Working in Offline mode

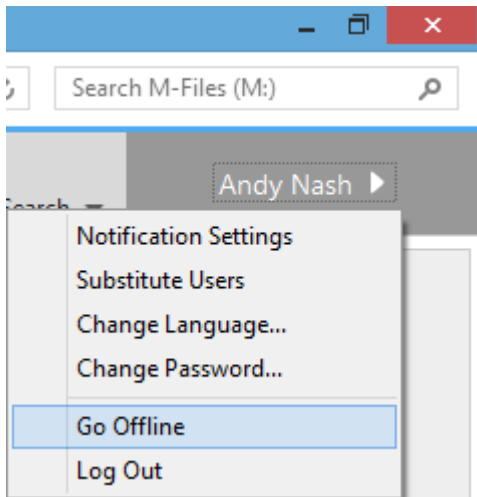
Creating new documents and modifying the documents that are available offline is possible. When the user returns to network, files are synchronized automatically.

You can view the documents to be synchronized in offline mode in Offline view.

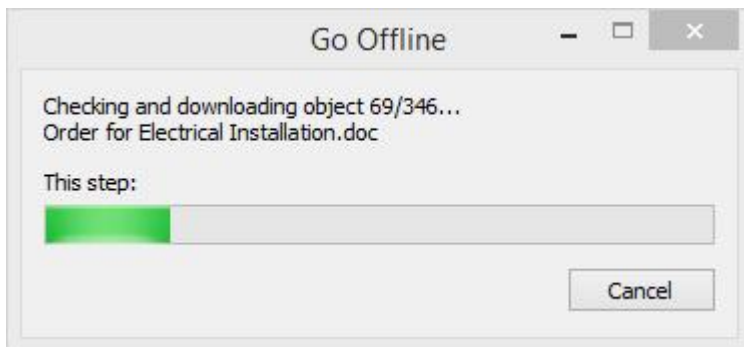


Offline view

Switch to offline mode to synchronize the documents. Do not unplug the network cable.

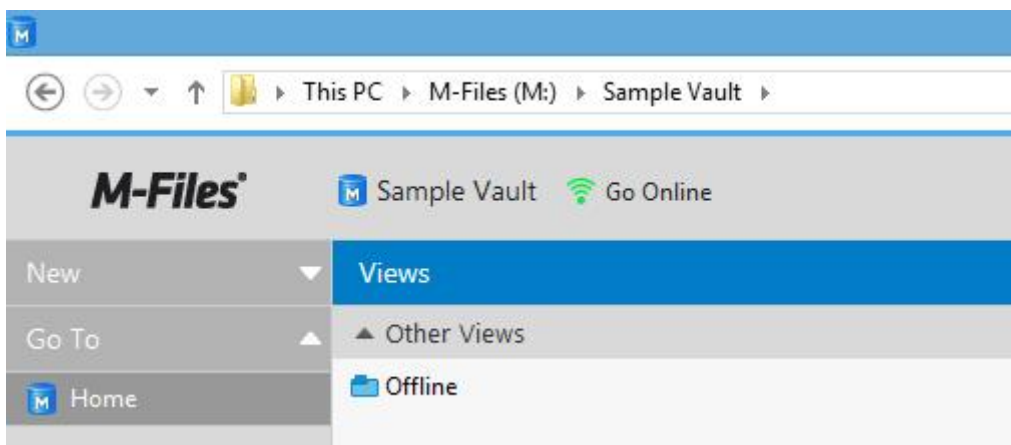


Go Offline feature



Documents are synchronized to Offline mode

In Offline mode, only Offline view is shown in the home view. User can access documents through this view.



Only Offline view is visible in Offline mode

Return online with Go Online feature found on top pane. Documents that have been created or edited remain checked out to the user. Checked out documents can be easily checked in through Checked Out to Me view.