

# M-FILES FOR FINANCIAL SERVICES DEMO VAULT DESCRIPTION



VERSION 1.1 | LAST UPDATED 24 NOVEMBER 2020

## 1. Description

The Financial Services demo vault covers document management use cases from financial services industry point of view. Financial Services covers high amount of different kinds of services and it is not possible to make one demo that would be relevant to each of the sub-industries. This is especially true with processes and vocabulary.

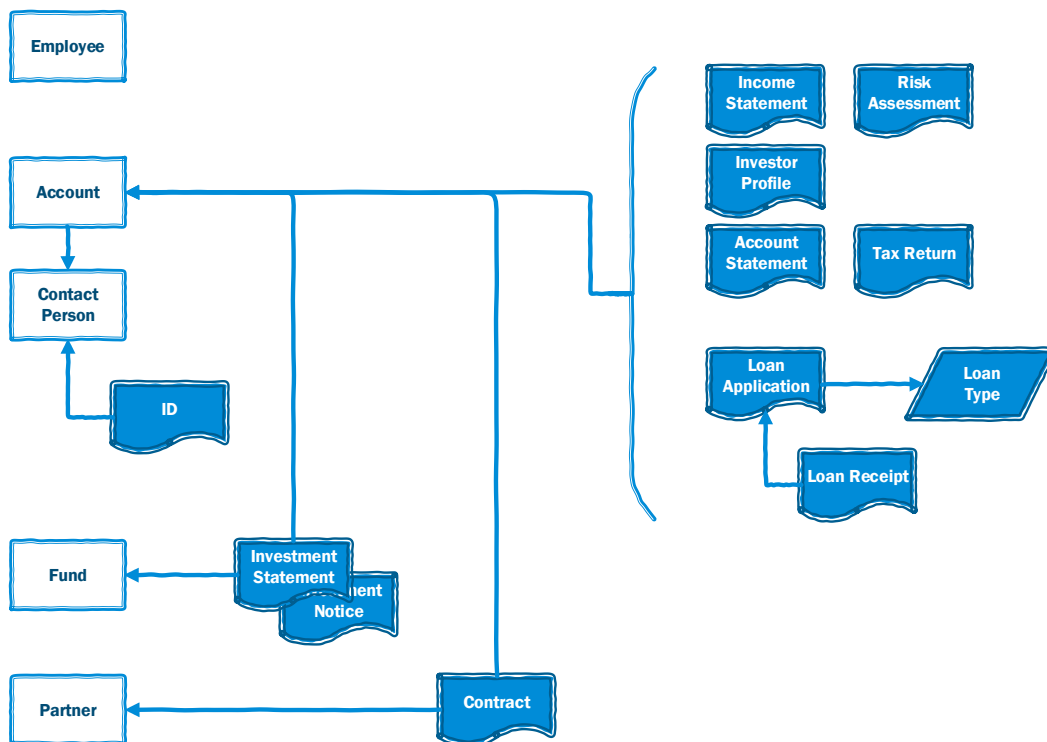
There are many common pain points across sub-industries that we try to cover with the demo, these include

- Document management and document control
  - o How documents from multiple sources are managed and accessed?
  - o How document quality is kept reasonable?
  - o How processes and employees can be helped with workflows?
- Process control and automation
  - o How system can help employees to execute faster and with better quality?

**NOTE: There are demo specific documents found in Demo Vault MFD that should be extracted to your local demo environment at c:\ShareFolder. Files should be extracted so that under SharedFolder -folder, there are FinancialServices folder. These documents are used in IML use cases show in demo instruction video.**

### 1.1 Vault Structure

In addition to Documents, vault contains Accounts, Funds, External Contact Persons, Employees, Departments and Partners. Below picture shows main relationships between these objects and some of the document classes. Majority of documents are related to with Accounts, but some are also connected to Contact Person (e.g. ID / Driver's license) and other objects.



## 2. Links for more detailed info

This document and demo instruction video is with demo vault in multi-file document and these are published to Product Info vault and Partner Portal. Playbook material can be found Product Info vault and Partner Portal. All material is attached to topic M-Files for Financial Services Playbook.

## 3. Changes

24.11.2020:

- M-Files Information Extractor updated to version 20.8.9339.1
- M-Files Network Folder connector updated to version 20.8.9339.3
- Compliance Kit updated to version 20.10.911.3

Needs M-Files 20.11.9630.6 or newer.