



M-FILES PROJECT DOCUMENTS

VERSION 1.1 | LAST UPDATED 24 NOVEMBER 2020

1. Short Description

M-Files for Project Documents demo vault scenario is in one-time production in elevator manufacturing company. Company needs to manage project related documents (project management documents, project content and customer deliverables) during project execution, closing and after sales.

Main demo features include

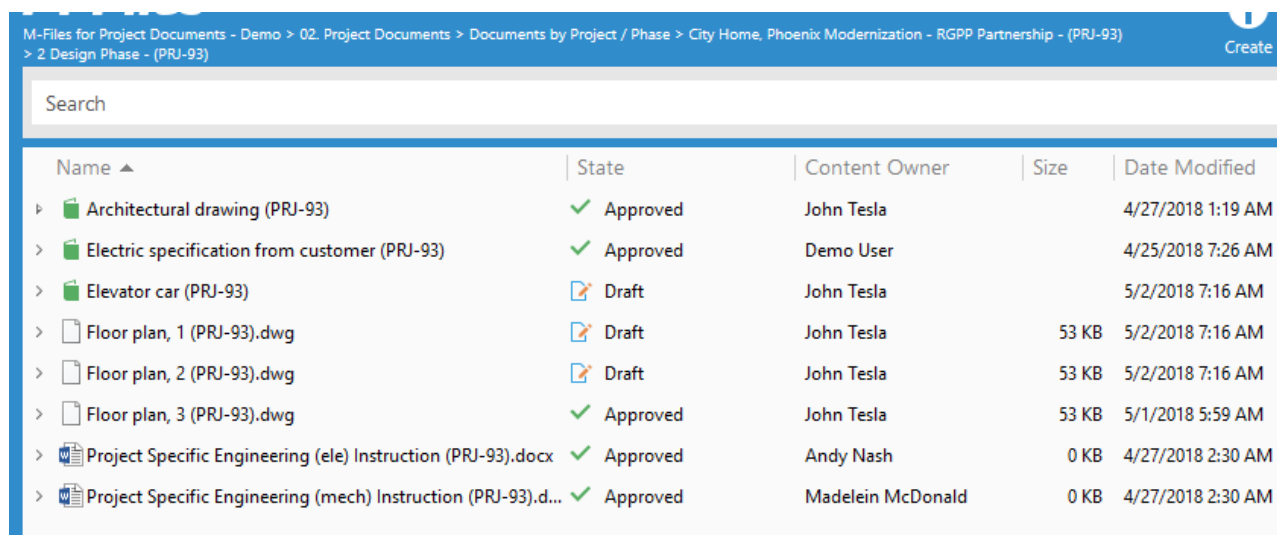
- finding project documents with searches and views by using different disciplines, projects, phases, document classes and content owners
- creating project related documents from project template when project is initiated
- exporting project related documents for customer during project closing

Additional features

- Accessing information from other repositories, in demo Network Folder and SharePoint connectors are enabled
- Information extractor can be demoed with example document
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2. Screenshots

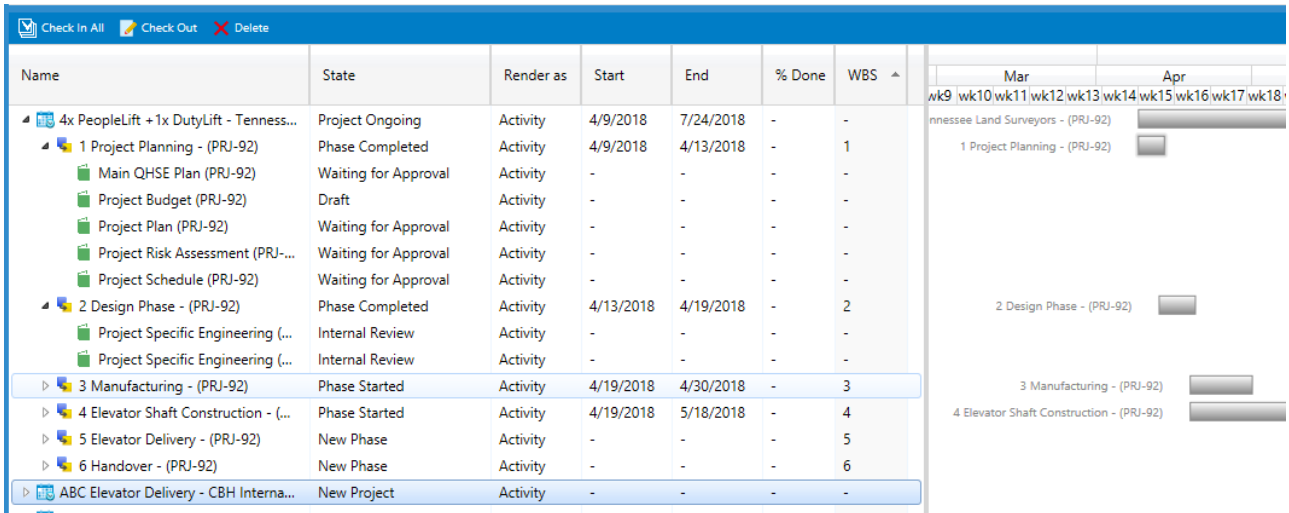
Accessing documents by Project and Phase



The screenshot displays the M-Files Project Documents interface. The breadcrumb navigation at the top reads: "M-Files for Project Documents - Demo > 02. Project Documents > Documents by Project / Phase > City Home, Phoenix Modernization - RGPP Partnership - (PRJ-93) > 2 Design Phase - (PRJ-93)". A "Create" button is visible in the top right corner. Below the navigation, there is a search bar. The main content area shows a table of documents with the following columns: Name, State, Content Owner, Size, and Date Modified.

| Name ▲ | State | Content Owner | Size | Date Modified |
|---|------------|-------------------|-------|-------------------|
| ▶ Architectural drawing (PRJ-93) | ✓ Approved | John Tesla | | 4/27/2018 1:19 AM |
| > Electric specification from customer (PRJ-93) | ✓ Approved | Demo User | | 4/25/2018 7:26 AM |
| > Elevator car (PRJ-93) | ✗ Draft | John Tesla | | 5/2/2018 7:16 AM |
| > Floor plan, 1 (PRJ-93).dwg | ✗ Draft | John Tesla | 53 KB | 5/2/2018 7:16 AM |
| > Floor plan, 2 (PRJ-93).dwg | ✗ Draft | John Tesla | 53 KB | 5/2/2018 7:16 AM |
| > Floor plan, 3 (PRJ-93).dwg | ✓ Approved | John Tesla | 53 KB | 5/1/2018 5:59 AM |
| > Project Specific Engineering (ele) Instruction (PRJ-93).docx | ✓ Approved | Andy Nash | 0 KB | 4/27/2018 2:30 AM |
| > Project Specific Engineering (mech) Instruction (PRJ-93).d... | ✓ Approved | Madelein McDonald | 0 KB | 4/27/2018 2:30 AM |

Accessing documents by using GANTT chart add-on



3. Changes

24.11.2020:

- M-Files SharePoint Online connector updated to version 20.2.17
- M-Files Information Extractor updated to version 20.8.9339.1
- M-Files Gantt chart updated to version 2.1.9
- M-Files Network Folder connector updated to version 20.8.9339.3
- Application licenses updated (expiration date 31.12.2021)

Needs M-Files 20.11.9630.6 or newer.

4. Links for more detailed info

Demo and template material

[M-Files Project Documents - Datasheet.pdf](#) (Desktop, Web, Mobile)

[M-Files Project Documents - Demo Guide.pdf](#) (Desktop, Web, Mobile)

[M-Files Project Documents - Solution Template Release Vault](#) (Desktop, Web, Mobile)

[M-Files for Project Documents - Extended Use Case Guide](#) (Desktop, Web, Mobile)

Additional sales material available in Product Info vault:

[M-Files for Project Document Management - Brochure.pdf](#) (Desktop, Web, Mobile)

[M-Files for Project Document Management - Business Case.pptx](#) (Desktop, Web, Mobile)

[M-Files for Project Document Management - Character Narratives](#) (Desktop, Web, Mobile)

[M-Files for Project Document Management - Sales Presentation.pptx](#) ([Desktop](#), [Web](#), [Mobile](#))

[M-Files for Project Document Management - Sell Card.pdf](#) ([Desktop](#), [Web](#), [Mobile](#))

[M-Files for Project Document Management - Solution Video.mp4](#) ([Desktop](#), [Web](#), [Mobile](#))