

# M-FILES FOR FINANCIAL SERVICES DEMO VAULT DESCRIPTION



VERSION 1.1 | LAST UPDATED 7 JANUARY 2021

## 1. Description

Responsible Person: Frank Taliano (frank.taliano@m-files.com).

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.

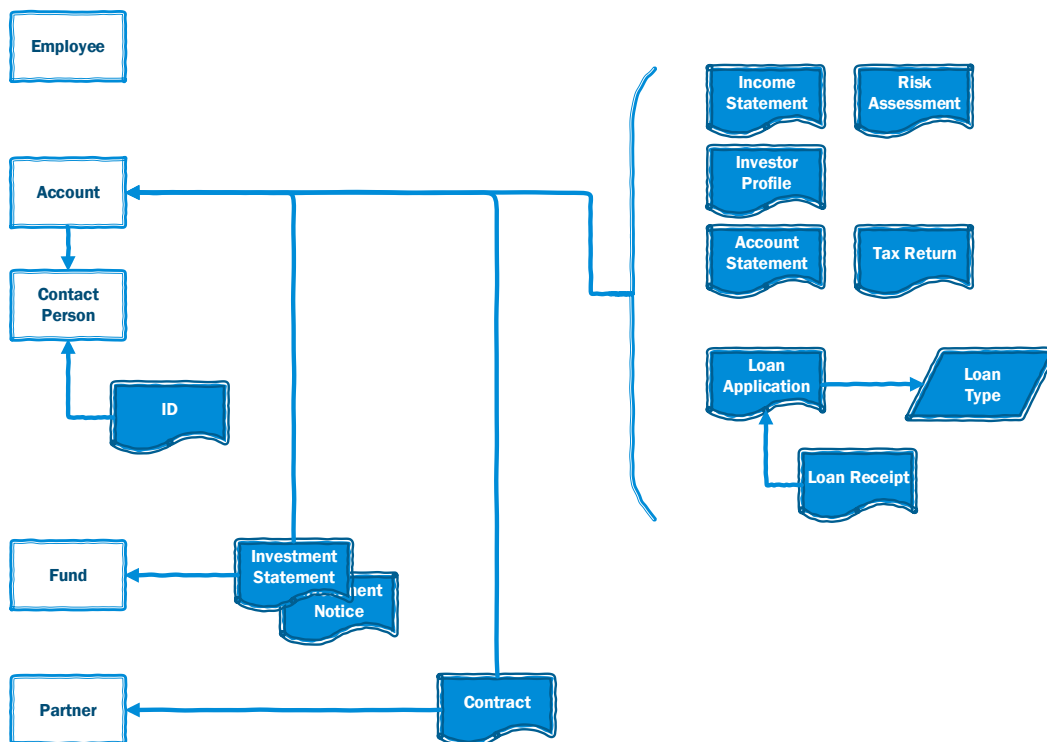
There are many common pain points across sub-industries that we try to cover with the demo, these include

- 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. Changes

07.01.2021:

- Compliance Kit updated to 20.10.911.3 (CK 2020)
  - License updated
- Information Extractor updated to 20.8.9339.1
- Network Folder connector updated to 20.8.9339.3

## 3. Links for more detailed info

Information available in Partner Portal:

[M-Files for Financial Services - Demo Vault](#)

[M-Files for Financial Services - Sales Presentation](#)

[M-Files for Financial Services - Business Case](#)

[M-Files for Financial Services - Flyer](#)

[M-Files for Financial Services - Sell Card](#)

[M-Files for Financial Services - Messaging Summary](#)