



M-FILES PROJECT DOCUMENTS

VERSION 1.1 | LAST UPDATED 7 JANUARY 2021

1. Short Description

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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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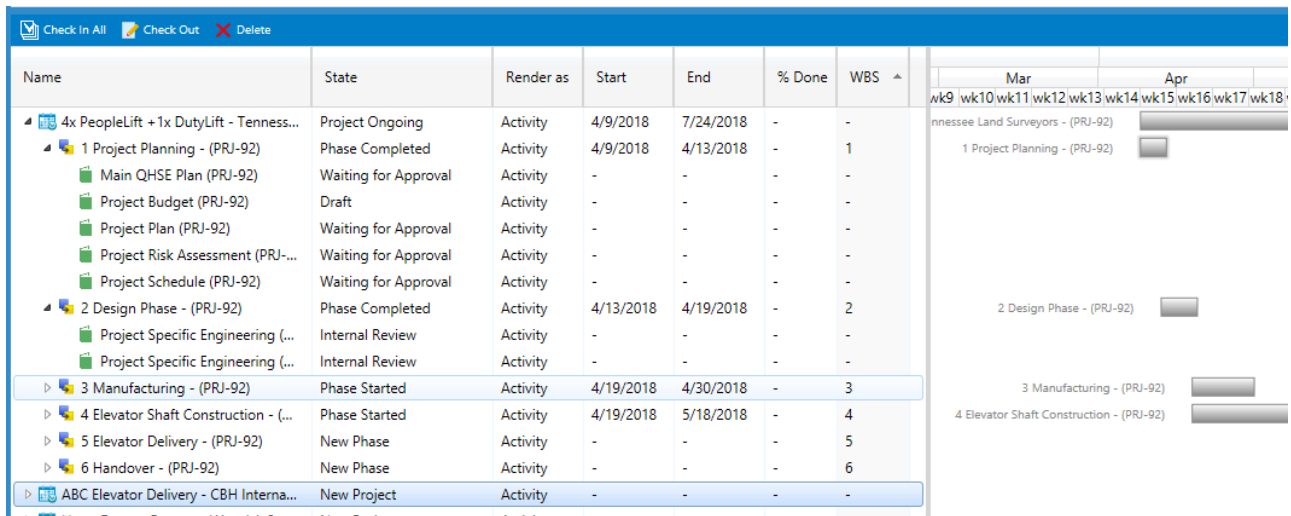
2. Screenshots

Accessing documents by Project and Phase

The screenshot shows the M-Files Project Documents interface. The breadcrumb trail 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 breadcrumb trail is a search bar. The main content area displays 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. Links for more detailed info

Demo and template material in Partner Portal:

[M-Files Project Documents - Datasheet](#)

[M-Files Project Documents - Demo Guide](#)

[M-Files Project Documents - Solution Template Release Vault](#)

[M-Files for Project Documents - Extended Use Case Guide](#)

[M-Files Project Documents - Configuration Guide](#)

[M-Files for Project Document Management - Flyer](#)

4. Vault Applications and features

M-Files Compliance Kit - 3.0.777.25

M-Files Gantt Chart - 2.1.0 - [User Guide](#).

M-Files Network Folder Connector - 19.9.8227.5 - [Configuration Guide](#).

M-Files Information Extractor - 19.10.8349.5 - [Configuration Guide](#).

M-Files Connector for SharePoint Online - 19.9.1 - [Configuration Guide](#).

5. Changes

07.01.2021:

- Compliance Kit updated to 20.10.911.3

- License updated
- Network Folder connector updated to 20.8.9339.3
- Information Extractor updated to 20.8.9339.1
- SharePoint Online connector updated to 20.2.17
 - License updated