

M-Files Project Document Management

Easy, effective management of project documentation with M-Files!

M-Files is a document management system that provides a quick and easy way to save your organization's documents in a centralized manner, so that they are available to all personnel who need them as an important resource. Since the reusability of documents increases and the time spent searching for information is minimized, the personnel can spend considerably more time on productive work.

M-Files makes it easy to find documents and to monitor the generation of documentation required for a certain project within the deadline given.

The *Project Document Management* add-on product provides an easy-to-use Web user interface, used to specify in what sequence and by whom documentation is created for the project.

Any documents missing from the project documentation can be easily spotted by using the monitoring panel.

Create a template project in M-Files

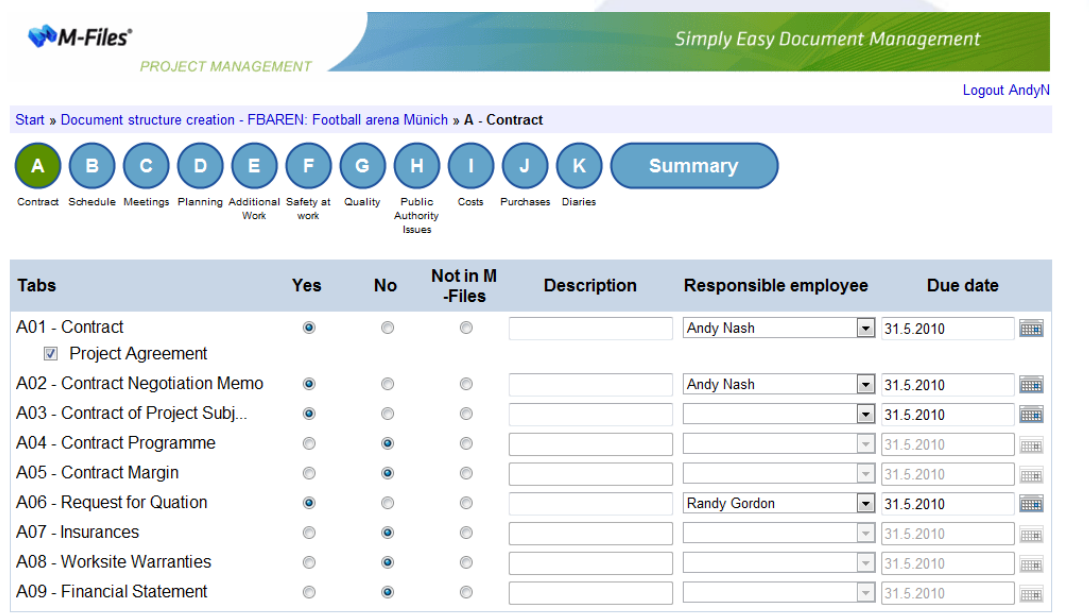
Use a template project to specify the phases usually included in a project delivery. A template project consists of folders and tabs. For example, the folders may cover *schedule*, *planning*, *work safety*, and *cost control*.

Each folder has tabs. For example, the tabs of the *work safety* folder include the following: regional plan and work safety policy.

A template project can be modified to suit the needs of almost any sector of operation, because the structure can be fully adapted by the customer.

Create a new project by utilizing the structure of the template project

You can choose which template project tabs to include in the project you have created. Specify the person responsible and a due date for every tab.



The screenshot shows the M-Files interface for creating a project structure. At the top, there's a navigation bar with 'M-Files' logo, 'PROJECT MANAGEMENT', and 'Simply Easy Document Management'. Below that, a breadcrumb trail reads 'Start » Document structure creation - FBAREN: Football arena Munich » A - Contract'. A row of circular buttons labeled A through K represents different tabs: Contract, Schedule, Meetings, Planning, Additional Work, Safety at work, Quality, Public Authority Issues, Costs, Purchases, Diaries. A 'Summary' button is also present. Below this is a table for configuring the 'A - Contract' tabs.

Tab	Yes	No	Not in M-Files	Description	Responsible employee	Due date
A01 - Contract <input checked="" type="checkbox"/> Project Agreement	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		Andy Nash	31.5.2010
A02 - Contract Negotiation Memo	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		Andy Nash	31.5.2010
A03 - Contract of Project Subj...	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			31.5.2010
A04 - Contract Programme	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			31.5.2010
A05 - Contract Margin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			31.5.2010
A06 - Request for Quation	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		Randy Gordon	31.5.2010
A07 - Insurances	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			31.5.2010
A08 - Worksite Warranties	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			31.5.2010
A09 - Financial Statement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			31.5.2010

Figure 1 (above): When you create a project, specify its scope, the due dates for the various phases, and the employee responsible.

Monitor the project's progress in real time

You can see the progress of the various phases of the project at a glance. It is easy to attach documents to the phases, and their status can be altered with a specially designed tool. This speeds up project meetings, because you can attach any missing documents to M-Files during the meeting!

Start » Project Followup - Football arena » Summary by Folders

Summary (A) (B) (C) (D) (F) (G) (H) (I) (J) (K)

Contract Schedule Meetings Planning Work Safety Quality Public Authority Issues Costs Purchases Diaries

Project overview

Additional reports: Summary by Employees

A - Contract	B - Schedule	C - Meetings	D - Planning
01 - Contract	01 - General Schedule	01 - Site Meeting	01 - Drawing Schedule
02 - Contract Negotiation Memo	04 - Release Schedule		02 - Drawing Distribution Policy
03 - Contract of Project Subjection			03 - Startup Planning Review
07 - Insurances			04 - Construction Planning Review

Figure 2: It is easy to check the general status of the project with the tool.

You can study the project's progress through the folder structure. With a single glance, you can see how many documents the phase involves, who is responsible for the phase, and the due date for that phase. You can edit phase information and documents directly from the user interface of the tool!

Summary (A) (B) (C) (D) (F) (G) (H) (I) (J) (K)

Contract Schedule Meetings Planning Work Safety Quality Public Authority Issues Costs Purchases Diaries

Progress report

B - Schedule

Tabs	Documents	Last modification	Responsible employee	Due date	
01 - General Schedule	0	Not modified	Alan Stone	23.2.2010	
04 - Release Schedule	2	23.2.2010 9:32:00 Andy Nash	Ben Griffith	24.9.2010	

Figure 3: You can use the tool to examine the status of each project folder. You can also bring up documents related to the phase with one click of the mouse!

It is also possible to monitor employee-specific statuses: you can see right away how many phases each employee is involved in and the status of these:

Start » Project Followup - Example Project » Summary by Employees

Summary (A) (B) (C) (D) (E) (F) (G) (H) (I) (J) (K)

Contract Schedule Meetings Planning Additional Work Work Safety Quality Public Authority Issues Costs Purchases Diaries

Employee	Completed	In progress	Late
Ben Griffith	3	5	11
Nicole Scott	0	21	6
Walter Johnson	0	19	2
Alan Stone	0	13	3
Helen Chase	0	13	2
Employee not defined	0	0	8

M-Files Project Document Management is an additional application available for M-Files users for a separate fee. For further details, please contact your M-Files representative or our sales department (sales@m-files.com).
