

## eCopy Connector for M-Files

M-Files is a document management system that provides a quick and easy way to organize your company's documents, projects, and customers, all in one convenient location. Customers regard ease of use and close integration with the Windows operating as especially strong points in favor of M-Files. The system handles the document management, and no separate actions are needed while saving or handling the data.

Full compatibility and integration with MS Office applications provides significant benefits with M-Files, for each individual user and for the whole company in everyday document management and administration. Integrated M-Files functions are available in AutoCAD and AutoCAD LT as well. The M-Files system also supports all other file formats.

In addition, to being integrated into these and many other applications, M-Files also offers extremely versatile possibilities for digitalization of paper documentation. The easiest and safest way is to use the M-Files scanning extension with the eCopy ScanStation system.

**With the eCopy Connector for M-Files application, scanned documents can be saved directly from a multifunctional printer to M-Files. At the same time, metadata and a classification are chosen for the document to be scanned.**

**The content of the scanned document is recognized using optical character recognition (OCR), so documents can be found in M-Files also on the basis of their content.**

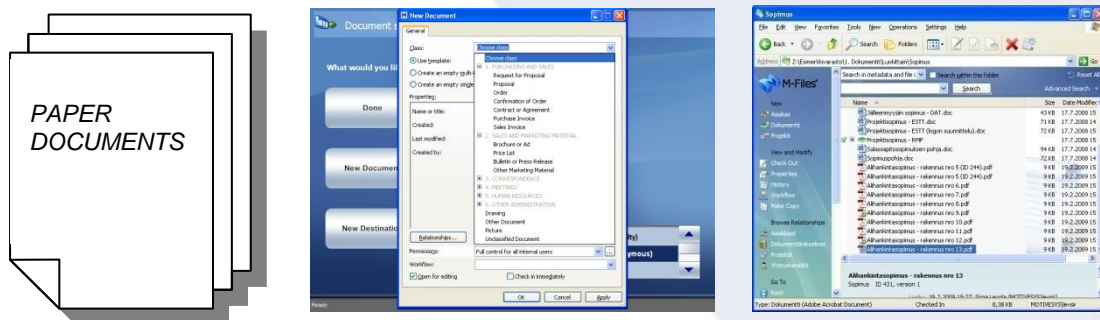
### Main features of eCopy Connector for M-Files:

- an interface that is very easy to use
- automatic character recognition (OCR) with eCopy
- scanning and saving of documents directly from a scanner to M-Files
- selecting and filling in of metadata directly in the scanning phase

**TIP:** You can also define various permission settings, workflows, and other functions for the documents to be scanned as automatic default options, so that the user just needs to perform the scanning.

With the application, you can make sure that **all scanned documents are saved in M-Files with their accompanying metadata**, so classification and document properties are defined in the scanning phase. This means that the user does not need to return to the document properties from the local workstation or move the document from one directory into another. Changes made in the M-Files metadata structure are immediately visible also in the multifunctional printer, so, for example, classification structure, customer lists, and user group default permission settings are always up to date.

Also available is a professional-use version of the application, which includes ID-based recognition. This means that, for example, in the scanning phase a signed contract can be attached automatically on the basis of its ID to an original contract template saved in M-Files.



DOCUMENT → **E COPY CONNECTOR FOR M-FILES + E COPY SCANSTATION** → M-FILES + OCR

## Using the application

There are two different ways of scanning documents directly into M-Files with the application: anonymously and by using identity scanning. The selection is made from the main menu (see Figure 1). Anonymous scanning is suitable for scanning, for example, brochures and other public documents. As a result, the application will not ask for a user ID or password for M-Files.

The *M-Files (Identity)* selection is used, for example, when the visibility of the scanned document in M-Files needs to be limited. For instance, a staff manager can save a signed employment contract to M-Files by first logging in to the system and selecting for this document *Only for me* as a permission setting.



Figure 1: Selection of the scanning method

After the scanning method is selected, the system scans the pages on the platen glass or in the document feeder and displays a scanning preview (see Figure 2). After this, the user can edit the scanned pages. When the scanning result is as desired, the *Next* button is clicked.

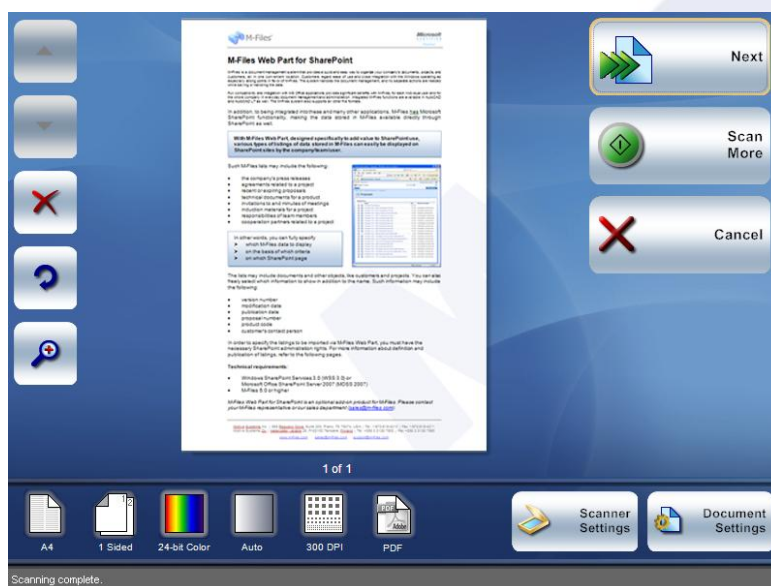


Figure 2: Preview of scanned files

Finally, the user defines metadata for the scanned document; that is, it is classified as an M-Files document. If the scanning method *M-Files (Identity)* was selected, the application now asks for a user ID and password. After this, the metadata card of the document is opened (see Figure 3), and classification can be performed in as versatile a manner as from the user's workstation. The user can also specify permission settings for the scanned document. When the document has been classified, the *OK* button of the metadata card is clicked, and the document is saved to the M-Files document vault.

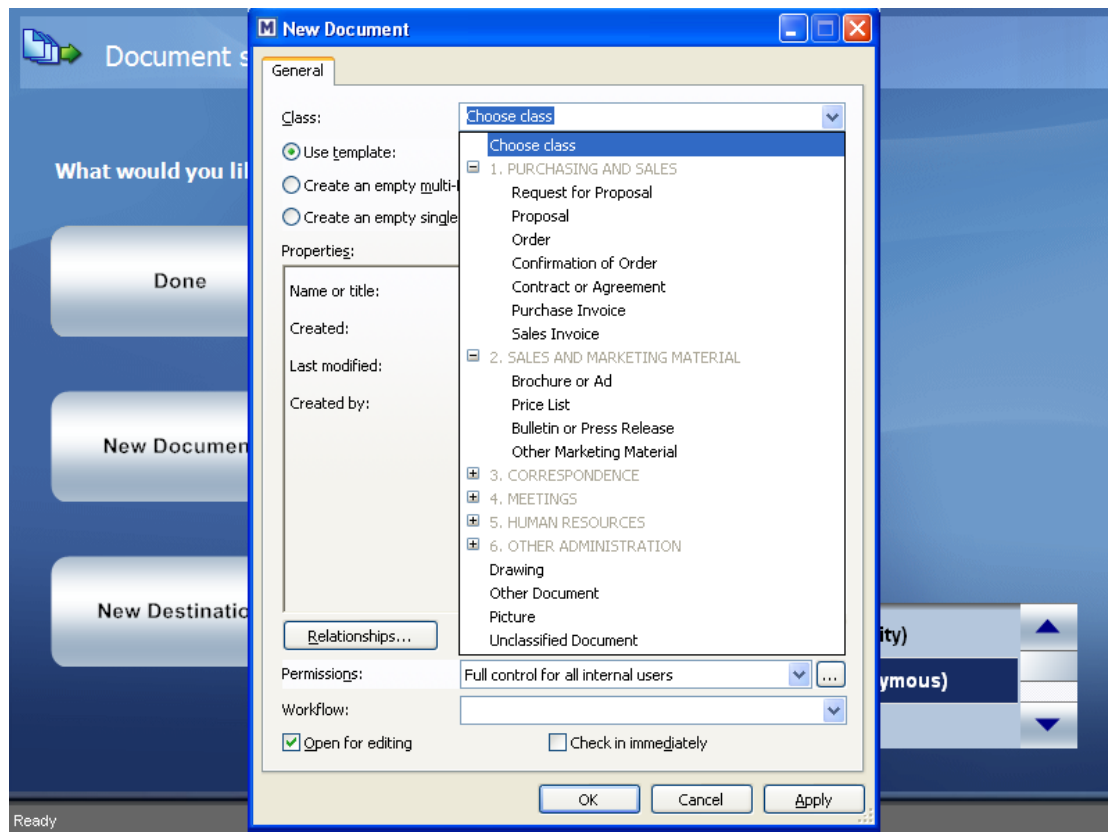


Figure 3: Classification of the scanned document, and filling in of the metadata

**TIP:** You can utilize the application when using SharePoint, in which case the scanned documents are displayed immediately in SharePoint according to their metadata. For further information about *M-Files Web Part for SharePoint*, please contact your M-Files representative or our sales department ([sales@m-files.com](mailto:sales@m-files.com)).

**Technical requirements:** eCopy ScanStation™ and M-Files 5.0 (or higher).

*eCopy Connector for M-Files M-Files* is an optional add-on product for M-Files. Please contact your M-Files representative or our sales department ([sales@m-files.com](mailto:sales@m-files.com)).