

Connections to External Sources / File Sources

By using *connections to external sources* you can significantly speed up the process of getting up and running with M-Files and importing existing data. For instance, you can create a link between an existing network drive and M-Files, which makes it possible to modify files both in M-Files and externally to M-Files. You can also import, or copy, files from an external source and when the imported files in M-Files are subsequently modified, the original file are not affected.

This feature can be used to create a link between M-Files and a scanner. Even very low cost scanners or multi-function printers with scanning capability can be set to save a scanned file to a network folder. M-Files can then be configured to import new files from a source folder which if set to be the folder where scanned documents are saved will create the link to automatically import scanned documents to M-Files.

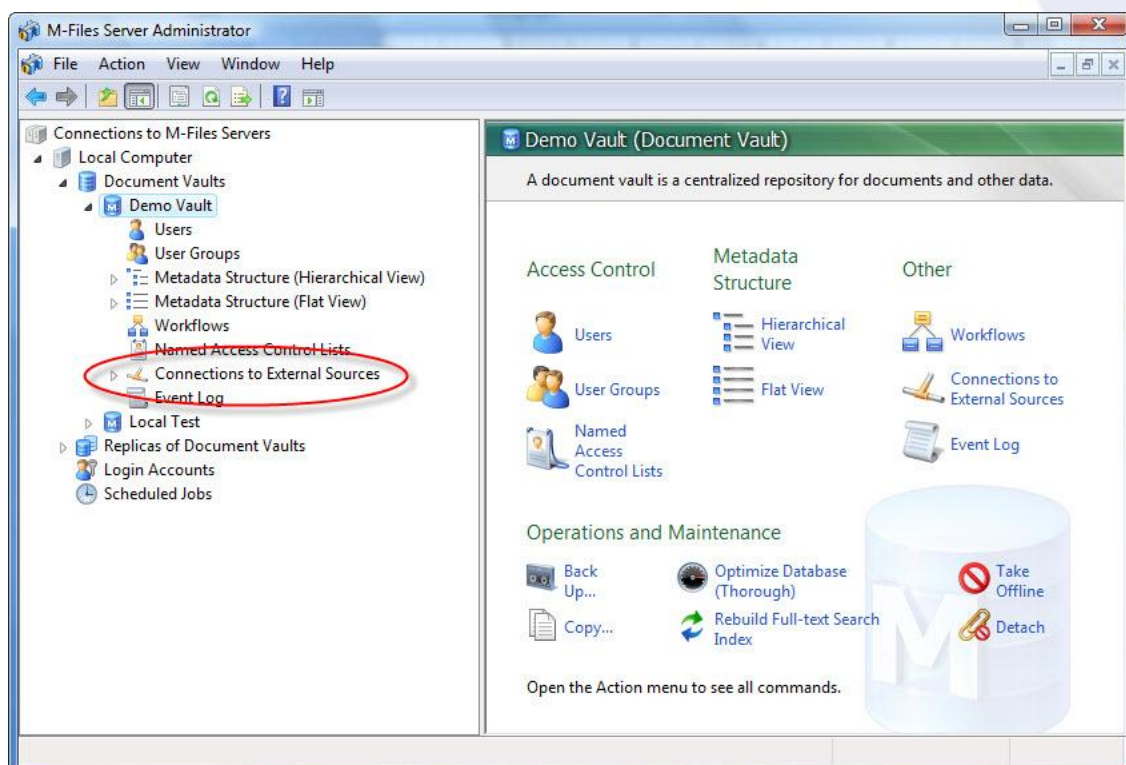
With certain types of devices that come with special scanning software, such as Hewlett-Packard MFP-series devices using HP Digital Sending Software (DSS), it is also possible to enter metadata via the device's touch screen. The scanned file and the metadata are then sent to the DSS software that can also perform optical character recognition (OCR). The scanned image and recognized text are then combined in a PDF file, and the PDF file and an XML metadata file are saved in a folder monitored by M-Files when a connection to an external source is configured; when new files are detected in the monitored folder, M-Files transfers the files to the vault as documents with metadata.

To create a new connection to an external source, you must have access and permission to run the M-Files Server Administration (MSA) application. If you do, launch the MSA and locate the vault to which you want to connect the external source.

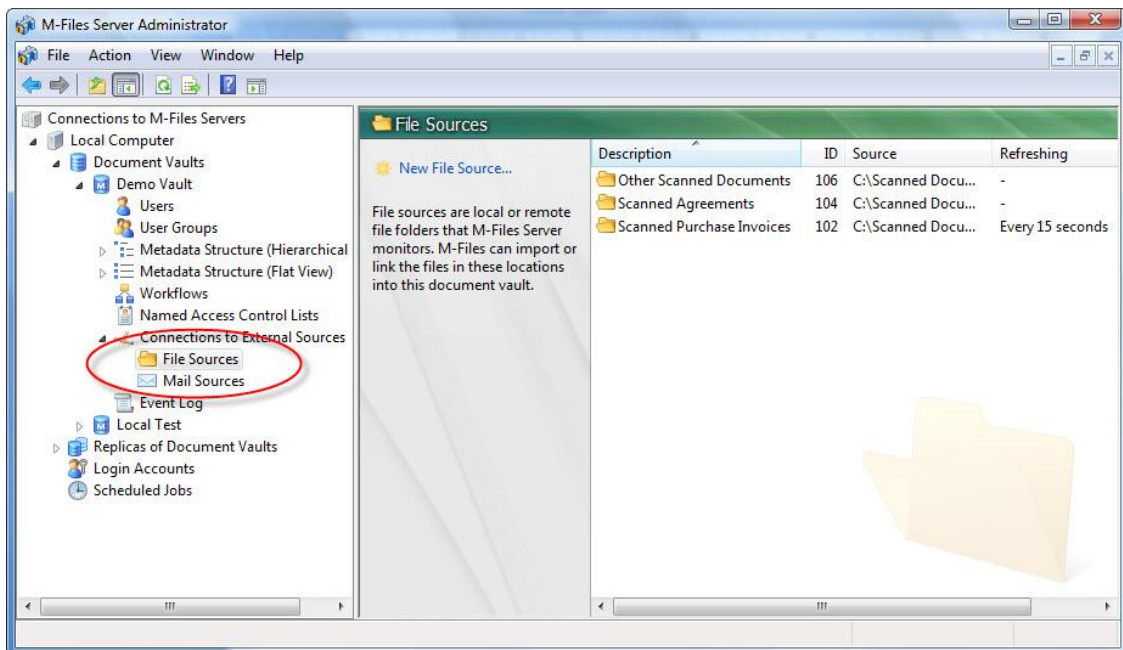
- **How to do it? Please use the following instruction to create a new connection.**

Connections to External Sources / File Sources

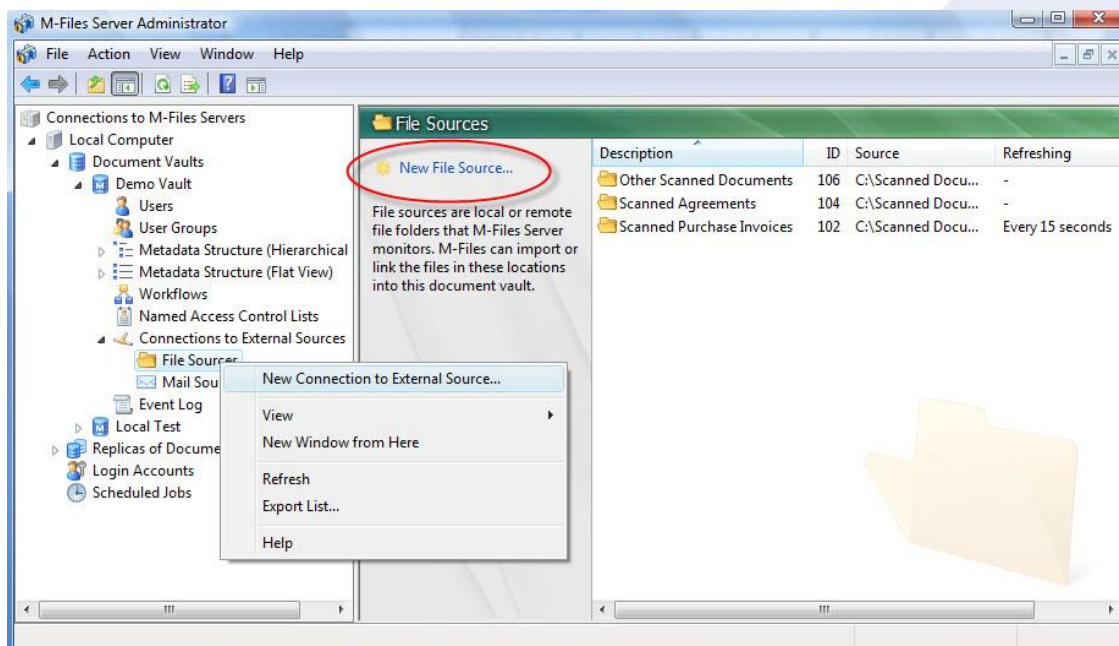
1. First, choose the option **Connections to External Sources** under the desired vault.



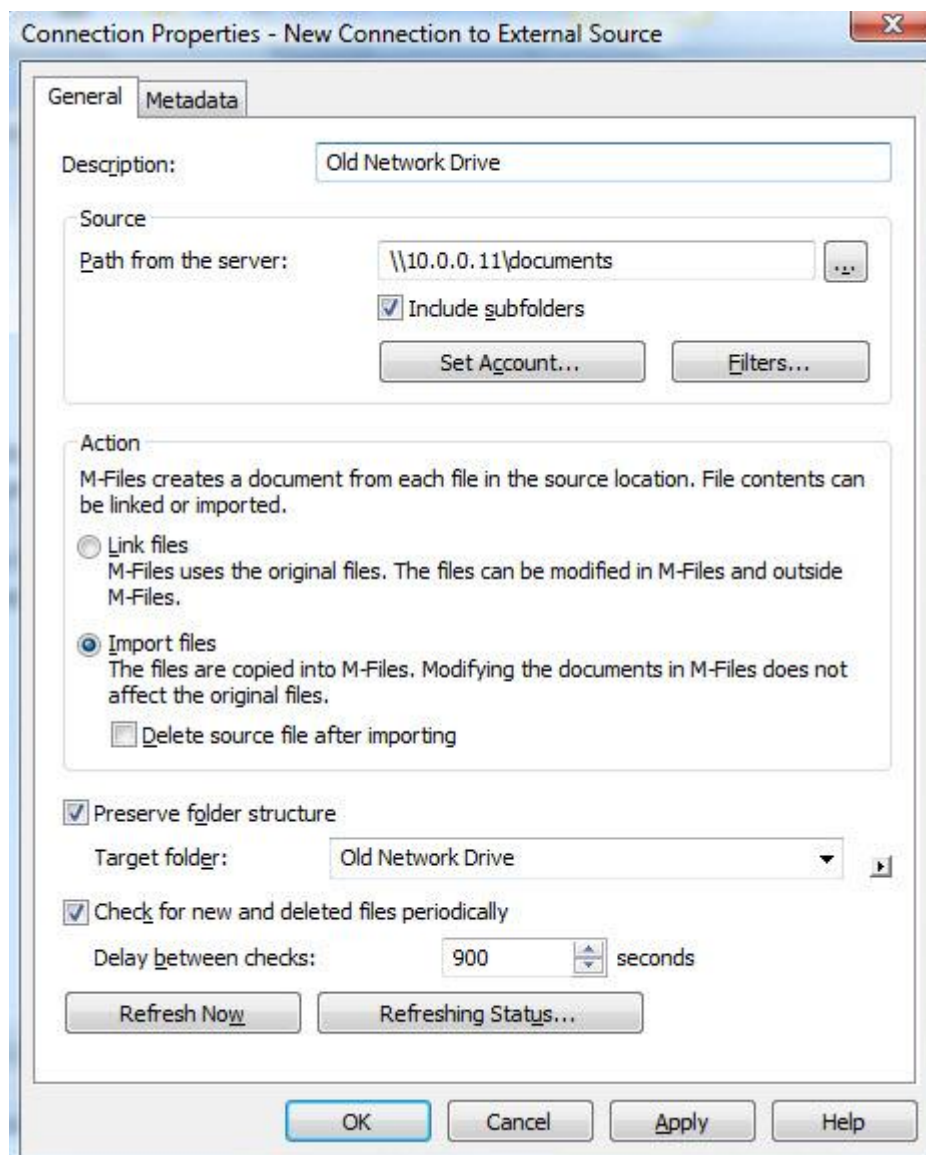
This option can be expanded to show two sub-options, **File Sources** and **Mail Sources** as shown in the figure below.



2. You can then either right click on File Sources in the menu along the left and choose **New Connection to External Source**, or choose **New File Source...** in the window region to the right.



The following dialog box will appear.



3. Then proceed as follows:

Description

Give the connection a name.

Source - Path from the server

Select the external location that you wish to connect to M-Files.

Source - Include subfolders

Check this box to connect the entire hierarchical folder structure to M-Files.

Source - Set Account

Specify an account for M-Files to use for processing files from the specified external location. By default, M-Files uses the identity of the system where the server is installed (Local System).

Source - Filters

Define the files to be processed. For example, you can include all files with the extension PDF by entering *.pdf in the include files list, and exclude all files with the extension TMP by entering *.tmp to the filter's exclude files list.

Action - Link files

If you select **Link files**, M-Files will use the original files. You can modify files both in M-Files and files located externally. Modifications made in M-Files are also visible to external users, and modifications made outside M-Files are also visible in M-Files. M-Files will store a version history of linked documents, so that all versions modified in M-Files will be available for future use. Linking is useful while launching the system, for example, when some users may still be without an M-Files license.

Action - Import files

If you select **Import files**, the files will be copied to M-Files. Modifying documents in M-Files will not affect the original files.

Delete source file after importing

If you check this box, the source file will be deleted after it has been imported to M-Files. This feature is useful, for example, when importing scanned files to M-Files.

Preserve folder structure

This setting preserves the imported folder structure in M-Files using traditional folders.

Target folder

The target folder is an M-Files target folder for viewing linked or imported files.

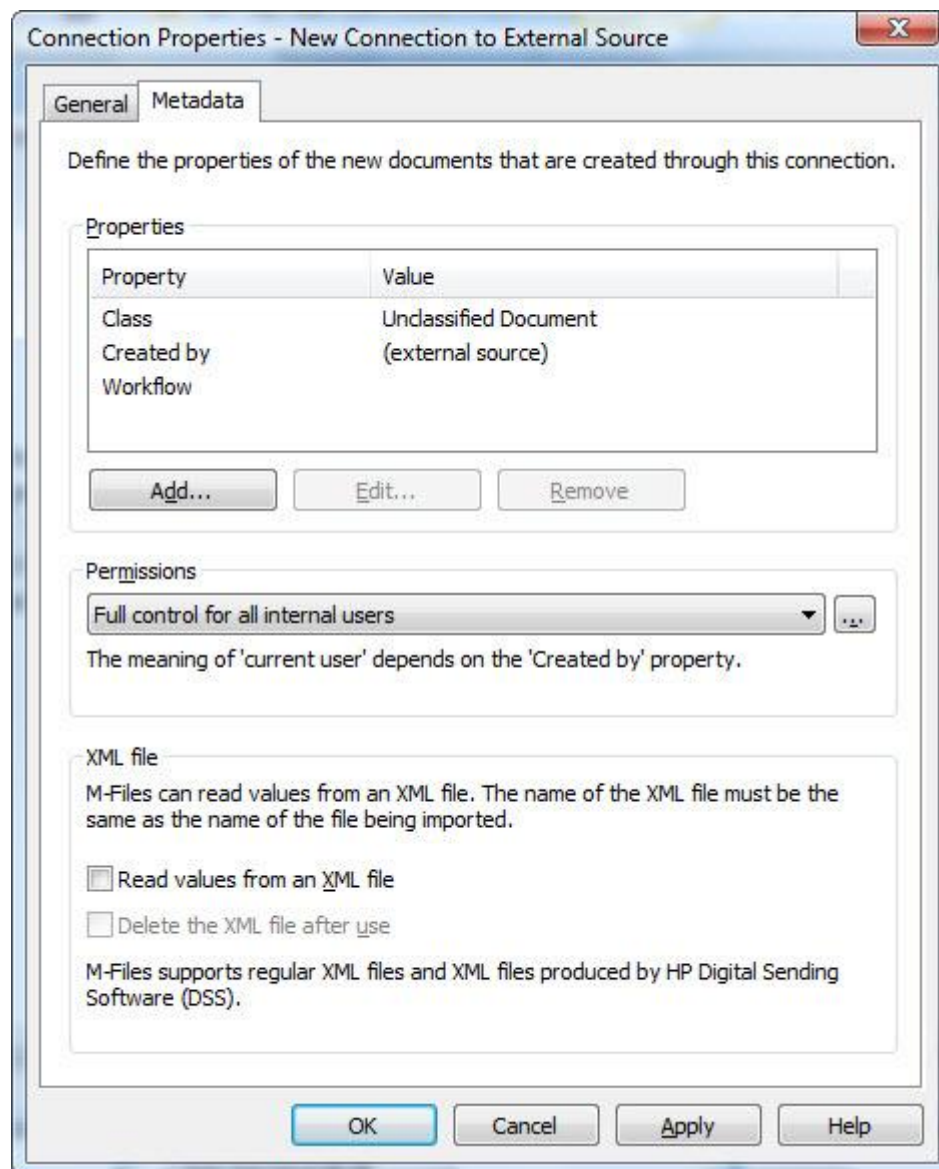
Check for new and removed files periodically

If you enable this option, M-Files will check the source folder at predefined intervals and update according to which files and folders are new and which have been deleted. In this way, any changes made to the source folder become visible in M-Files as well.

Refresh Now

Click **Refresh Now** to refresh the source folder immediately.

- Next, use the metadata tab to define properties for documents created externally.



Properties

Under Properties, define the metadata to be applied to new documents automatically. You can add, edit and delete properties. You can define a fixed property value, or M-Files can read it from an XML file produced by scanner with OCR software.

Permissions

Set the permissions for a new document. The meaning of the 'current user' value depends on the value of the document's 'Created by' property. You can set the value by selecting 'Created by' property and choosing Edit.

XML file

M-Files can read values in XML files. The name of the XML file must match the name of the file to be imported. If you want M-Files to read property values in XML files, select the *Read values from an XML file* option. M-Files can also delete the XML file after use.

Supported file formats:

- regular XML data
- XML data output by HP Digital Sending Software (DSS)

With HP DSS, you can define, for example, the *Customer* value to be input by scanner. If you want M-Files to utilize the input information, set up M-Files to read the property value in the HP DSS XML file and name the value *Customer*. With regular XML, use an XPath statement to define the relevant location. XPath is a W3C standard syntax for defining locations in an XML document.

Connections to External Sources / Mail Sources

M-Files also offers the ability to efficiently save, manage, and share important emails in a controlled and automated manner. The desired email messages can be transferred directly from the mail server to the document vault without the need for separate actions by the user.

For example, messages and their attachments sent to the organization's common email box can be transferred directly to the document vault. In the document vault, imported messages can be then processed with M-Files' workflow features. This can be useful for centralized management and processing of orders or proposals or invoices that have been sent to customers. Huge amounts of email are generated and often get lost in the chaos of individual folder configurations. Efficient management of emails can save significant amounts of time spent searching for emails or recreating common information when emails are lost.

Another useful approach is to save all or certain important sent emails. Such important messages could be proposals, order confirmations, invoices, etc. The organization can create a new "archive" e-mail account to which M-Files is connected. M-Files then imports all e-mail from this account's Inbox to the document vault and then deletes the messages from the mail server. Important sent messages can then be efficiently archived in M-Files by sending the message to the archive box by means of the Cc or Bcc fields. To avoid junk mail, it is possible to set the e-mail account to accept mail from internal users only.

Connections to mail sources can be set up via the M-Files Server Administration application. We won't cover that in detail in this tip, but go ahead and give it a try. It's easy.

If you encounter any technical problems with M-Files, please do not hesitate to contact us at support@m-files.com. If you have purchased M-Files licenses, please include your M-Files serial number in the message to ensure that you receive priority support.
