

Tech Tip: Importing Files and Folders

One of the first questions new users of M-Files ask is how do they import their existing files into the M-Files vault. The answer: it's easy, just use the **"Import Files and Folders"** command.

The **"Import Files and Folders"** command allows you to easily import even large numbers of files to M-Files. Selecting this function opens a dialog box where you can specify which files and folders are to be imported and how they should be organized.

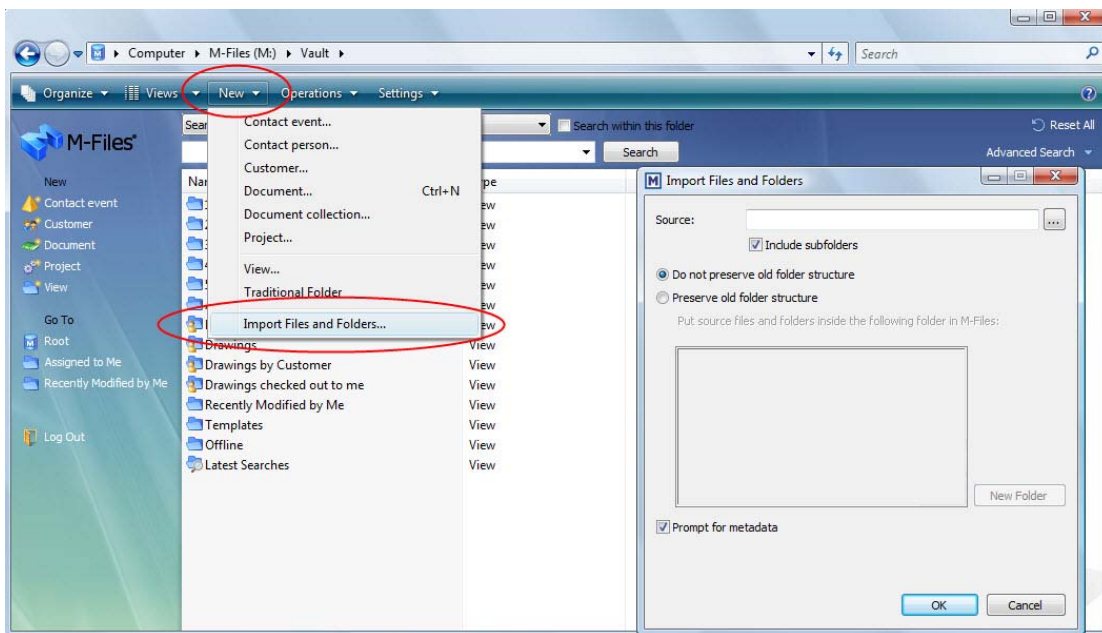


Figure 1: Selecting the Import Files and Folders Command

Importing files to M-Files is straightforward.

First, the Import Files and Folders command can be found in the M-Files' "New" pull down menu as shown in Figure 1 above. Once selected this brings up the Import Files and Folder dialog box as shown in Figure 2 below.

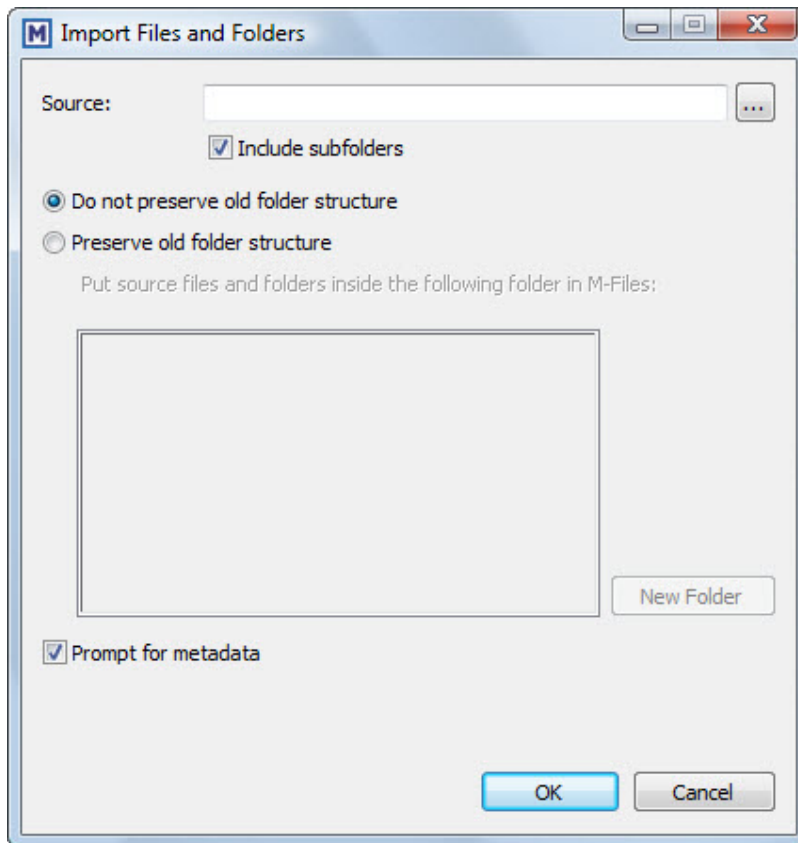


Figure 2: Import Files and Folder Dialog Box

Source

The first thing you need to do is select the source from which you wish to import files or folders to M-Files.

Include subfolders

If you wish to also import the subfolders and their contents from the selected source, select **Include subfolders**.

Do not preserve old folder structure

If you wish to transfer the files to M-Files without preserving the folder structure, select **Do not preserve old folder structure**. The imported documents will now appear, as usual, in M-Files views sorted by their metadata.

This is important, as it is highly recommended that you use metadata to sort and categorize and sort data rather than the old folder structure which has limitations based on the nature of traditional folders, for instance, a single file can only exist in one folder, whereas using metadata and dynamic views, a single file can show up in numerous views and searches based on the context.

Preserve old folder structure

When you select **Preserve old folder structure**, you can continue to use the old folder structure also in M-Files. Select the *traditional folder* where you wish to import the files or folders. To create a new traditional folder, click **New Folder**. M-Files will now preserve the folder structure of the files and folders that are transferred. You can explore the structure by going to the traditional folder where you imported the material. The imported documents appear both in traditional folders and in M-Files view folders sorted by their metadata.

Prompt for document properties

If you wish to enter metadata for the documents when transferring them, select **Prompt for document properties**. For example, if you are transferring memos to M-Files, select document class *Memo* in the document card, then select *OK to all*. All imported documents will now be classified as Memos.

Note that in this way, you can import multiple types of documents in “chunks.” Your M-Files vault structure will define the types of document classes available, and then an efficient approach is to import those classes of documents in one step, as described with Memos above.

If you leave this box unchecked, all imported files will be assigned to document class *Unclassified Document*. You may add document metadata later on, or change the document class, for example.

Permissions

Specify permissions for the imported files and folders. The *Permissions* field is visible only if no other properties are defined for the documents. Otherwise permissions are defined on the document card.

Automated Import

It is also possible to use the M-Files API to import large amounts of documents with existing metadata. When such a situation exists, it is possible to develop an “import tool” that will automatically import the documents and map the existing metadata to the appropriate corresponding metadata in M-Files. If you are interested in developing this type of import tool, please contact us at sales@m-files.com for more information.

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.
