

# M-Files for SharePoint

*Simply Easy Document Management finally available in SharePoint too!*

M-Files is a document management system that enables companies and organizations of all sizes in a variety of industries to make dramatic gains in efficiency and productivity by improving the way they organize and manage their business documents, information, and processes. M-Files uses the instantly familiar Windows Explorer interface, so if you know Windows, you know M-Files. All Windows applications are supported so users just use the standard Open and Save commands they already use every day.

In addition to seamless integration with MS Office, M-Files supports all file formats without the need for special plug-ins. M-Files also provides the ability to interface directly with other business applications and databases such as CRM, ERP and accounting systems. For example, a document such as a proposal or invoice stored in M-Files can be associated, or tagged, with customer records that are stored and maintained in the company CRM or accounting system.

In addition to its Windows Explorer interface and tight integration with all Windows applications, M-Files has an interface to SharePoint allowing documents and other information stored in M-Files to be accessed directly through SharePoint.

**With M-Files for SharePoint you can add significant value to SharePoint use by listing, editing, searching for and linking to M-Files content on SharePoint sites!**

## Display any M-Files listings direct in SharePoint

Any M-Files content can be displayed and edited directly in SharePoint. The permission settings defined in M-Files also apply in SharePoint, so a user who doesn't have access to a document in M-Files cannot access it through SharePoint either.

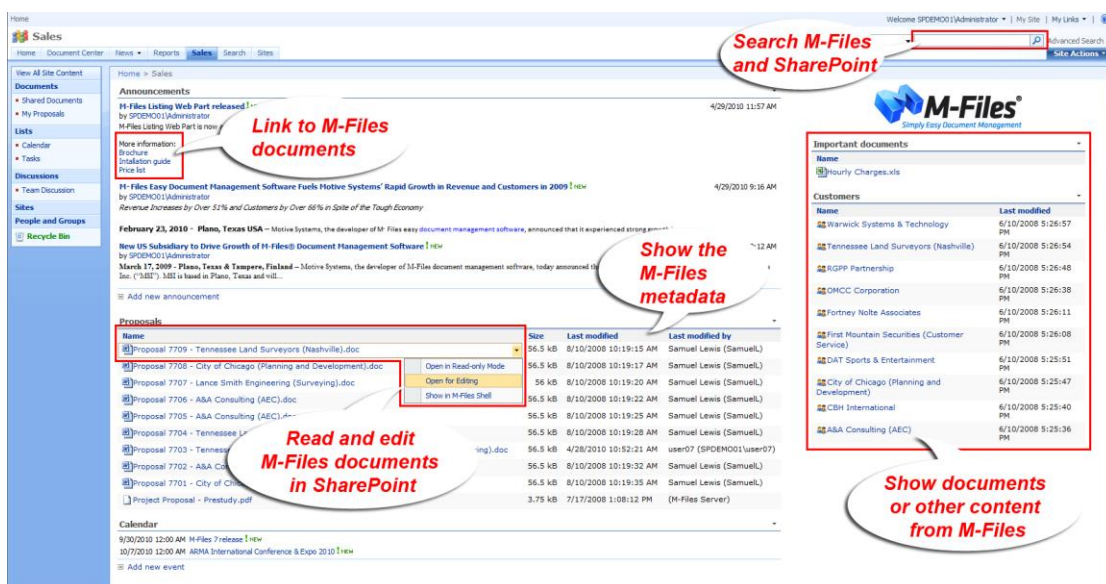


Figure 1: With M-Files for SharePoint M-Files documents can be listed, opened and edited directly from SharePoint. M-Files documents can also be linked to other SharePoint content and included in SharePoint search results.

M-Files lists can include any document or information stored in M-Files, such as:

- Company marketing material
- Project-related:
  - Agreements and Contracts
  - Technical documents
- Customer-related:
  - Recent or expiring proposals
  - Invoices and Purchase Orders
- Admin-related:
  - Meeting Invitations, minutes, and HR documents

In other words, you can fully specify

- which M-Files data to display
- on the basis of which criteria
- on which SharePoint page

## Display M-Files metadata in listings

In addition to enabling creation of dynamic listings of documents, M-Files for SharePoint allows the display of document metadata in listings. For example, as shown in the figure below, the proposal's deadline and status are conveniently shown in the listing.

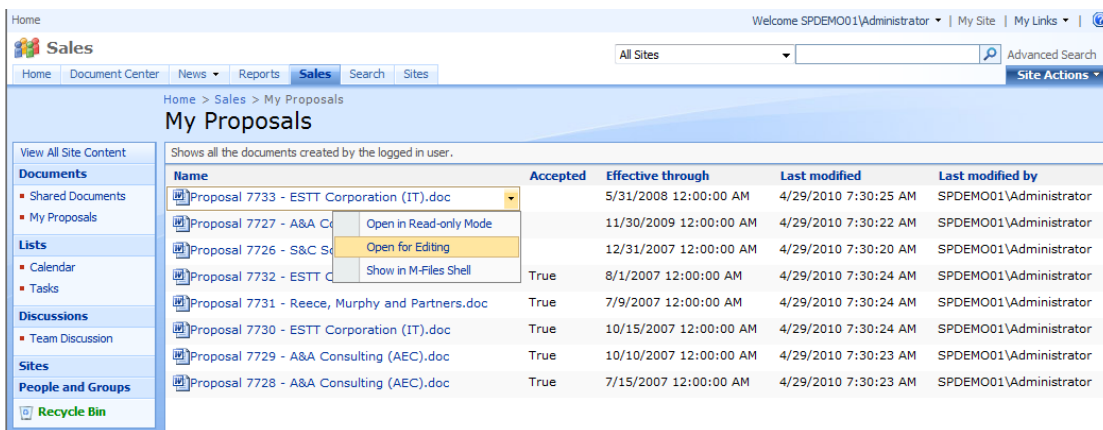


Figure 2: Document metadata such as status can be shown as columns in listings.

## View and edit M-Files documents in SharePoint

Specify documents and other objects as read-only or make them editable. In the latter case, a SharePoint user may both view and edit the documents. Documents can be read and edited even without M-Files Client installed on the user's computer.

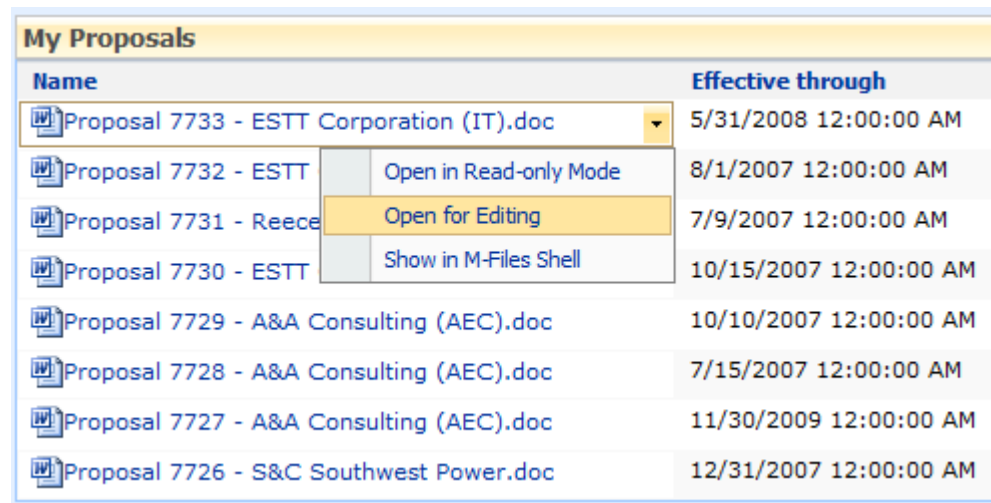


Figure 3: Read and edit M-Files documents in SharePoint.

## Show M-Files documents in SharePoint search results

You can include M-Files documents in the SharePoint search results. M-Files finds documents if the search terms are found in either the document metadata or file contents!

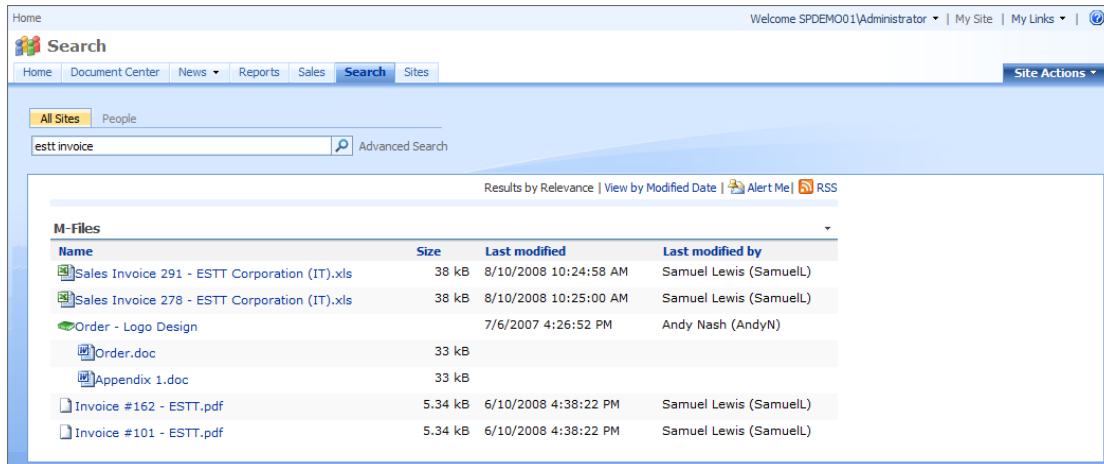


Figure 4: M-Files documents can be included in SharePoint search results.

## Link to M-Files documents in SharePoint content

You can also link to M-Files documents from SharePoint announcements and other content. In the example below, the brochure, installation guide and price list are all stored in M-Files.

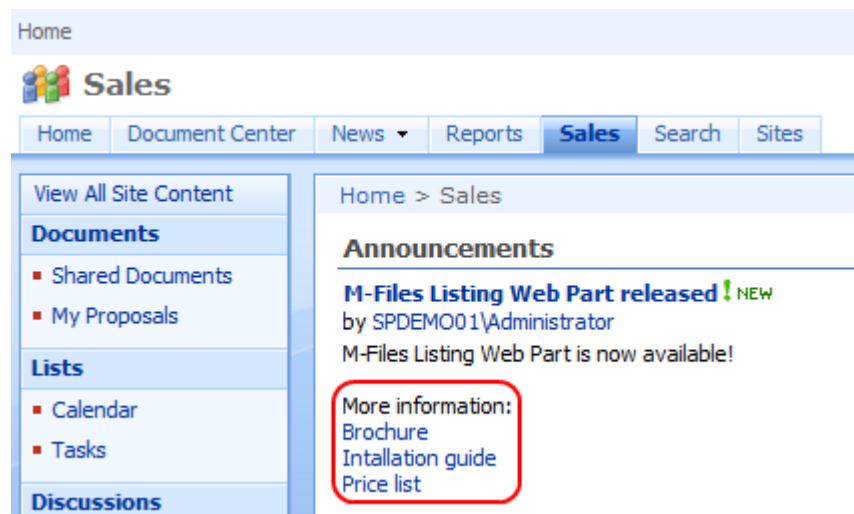


Figure 5: Link to M-Files documents from SharePoint such as announcements and other content.

## Publish Quickly and Easily from M-Files to SharePoint

One of the key benefits of M-Files for SharePoint is that it enables users to take advantage of SharePoint's powerful publishing capabilities without having to know the details of the SharePoint publishing mechanisms or architecture. For instance, the publication of documents can be based on simple criteria or rules, such as *Proposals created by me within the last 30 days* or *Drawings related to Project X*.

It's also possible to allow users to publish documents on any SharePoint site. For instance, if there was an "Important documents" section of a particular SharePoint page, documents meeting the "important documents" criteria as defined by properties in M-Files could be automatically published in the appropriate SharePoint listing. To publish documents, users can then just adjust the appropriate properties in M-Files.

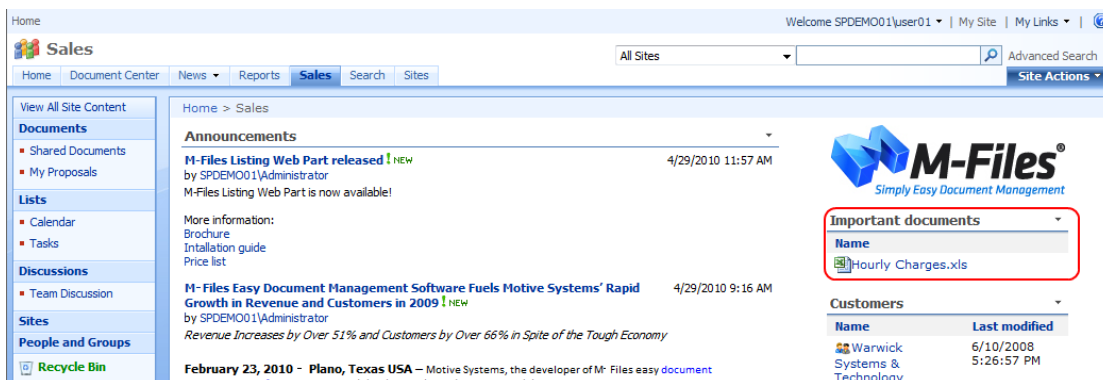


Figure 6: Documents can be explicitly published in SharePoint without a generic rule.

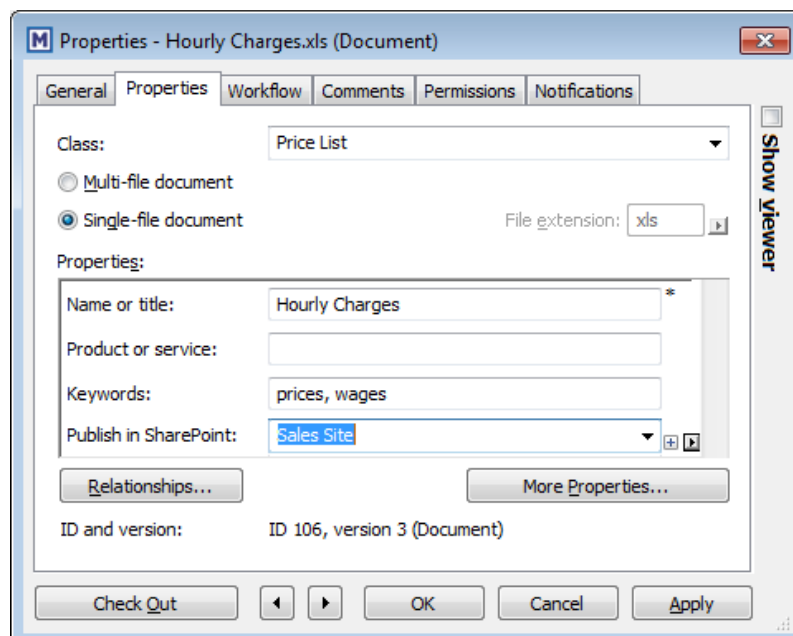


Figure 7: The publication site is defined with the M-Files metadata card.

M-Files for SharePoint 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)).

**Technical requirements:**

- Windows SharePoint<sup>®</sup> Services 3.0 (WSS 3.0)\* *or* Microsoft Office SharePoint<sup>®</sup> Server 2007 (MOSS 2007)
- M-Files 6.0 or higher

\* Limited support

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