M-Files Content Management - Power of Metadata

Janne Romppanen

Vice President, M-Files Inc.

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Vaasa
Kauhava
Laihia
Kurikka
Alavus
Ahtari
Kauhajoki
Virrat
Keuruu
Jyväskylä
Kuopio
Varkaus
Pieksämäki
Joensuu
Kaustinen
Iisalmi
Nurmes
Lieksa
Viitasaari
Siilinjärvi
Saarijärvi
Äänekoski
Suolahti
Outokumpu
Kontiolahti
Parkano
Jämsä
Juva
Savonlinna
Kankaanpää
Ikaalinen
Hämeenkyrö
Orivesi
Joutsa
Mikkeli
Sortavala
Сортавала
Pori
Tampere
Nokia
Kangasala
Sastamala
Kokemäki
Huittinen
Valkeakoski
Toijala
Padasjoki
Heinola
Imatra
Lappeenranta
Priozersk
Приозерск
Rauma
Hämeenlinna
Hollola
Lahti
Kouvola
Loimaa
Forssa
Uusikaupunki
Mynämäki
Orimattila
Vyborg
Выборг
Somero
Hyvinkää
Karkkila
Hamina
Turku
Paimio
Salo
Tuusula
Porvoo
Lovisa
Kotka
Pargas
Nummela
Lohja
Pernio
Helsinki
Kirkkonummi
Ekenäs
Mariehamn
Gävle
Sandviken
Falun
Tierp
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Курортный р-н
Saint Petersburg
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Örnsköldsvik V
Örnsköldsvik
Sollefteå
Härnösand
Sundsvall
Sundsvall S
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Hudiksvall
Bollnäs
Söderhamn
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LE
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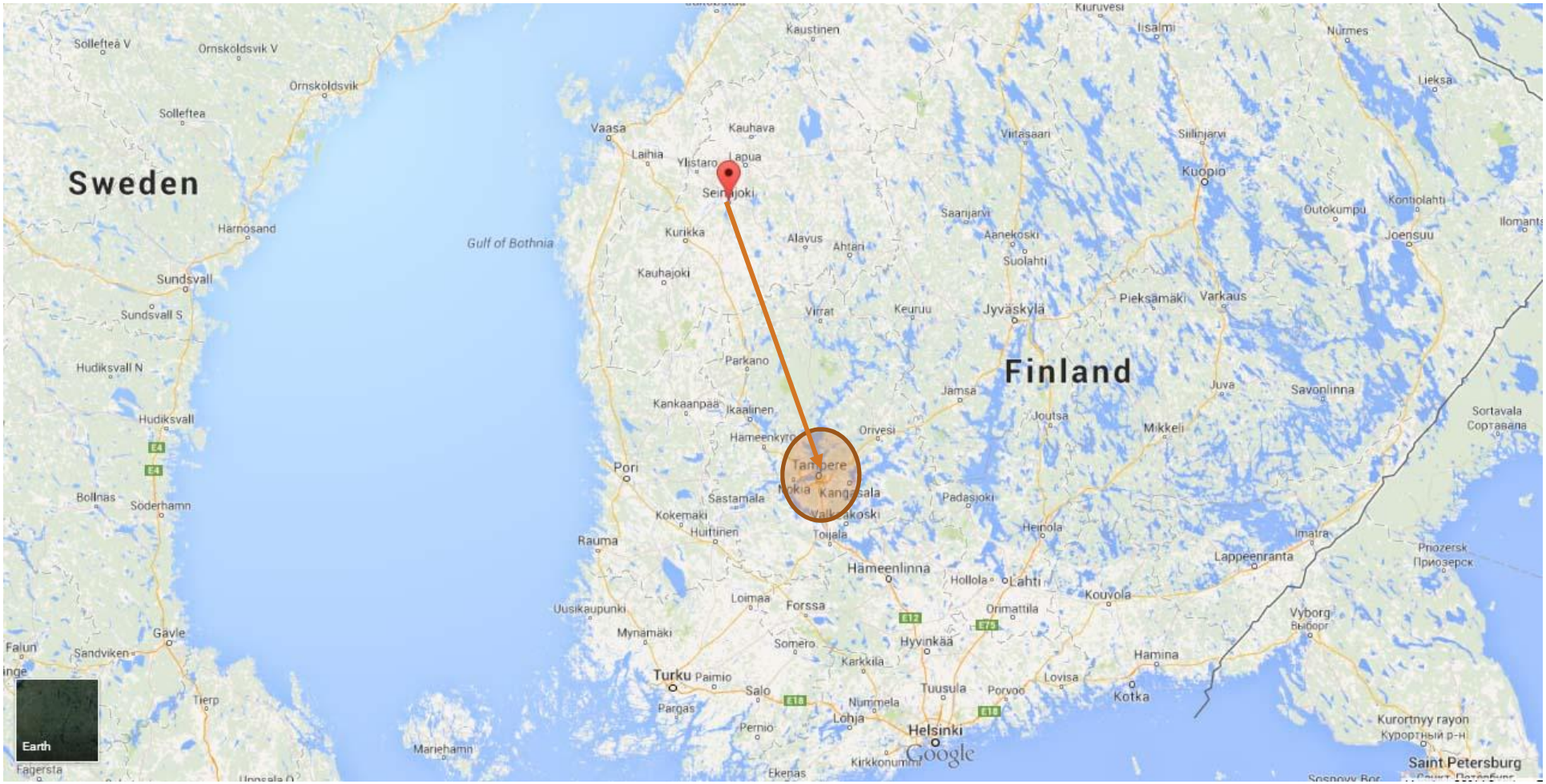
A.NIVALA
AUKIOLOAJAT
MA-PE 10-14
LAU. 12-14
SUN. 16-18

METADATA-POWERED INFORMATION MANAGEMENT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Hudiksvall N
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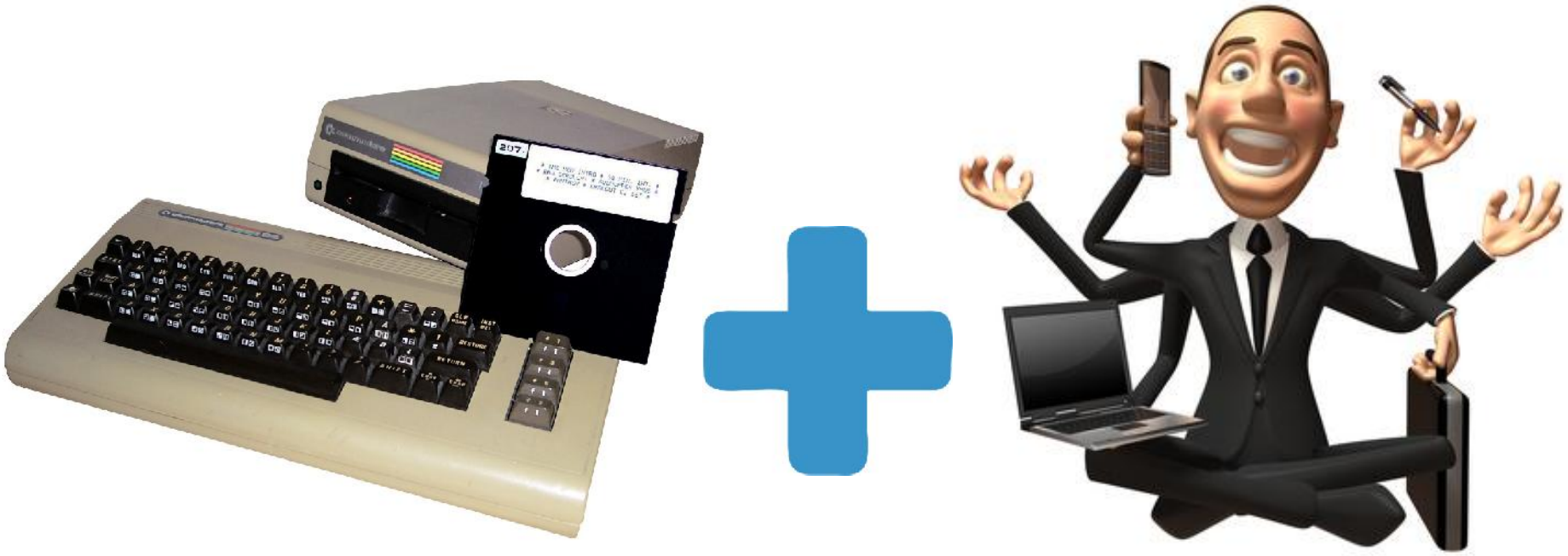
Tierp
Mariehamn
Fagersta
Earth
Google



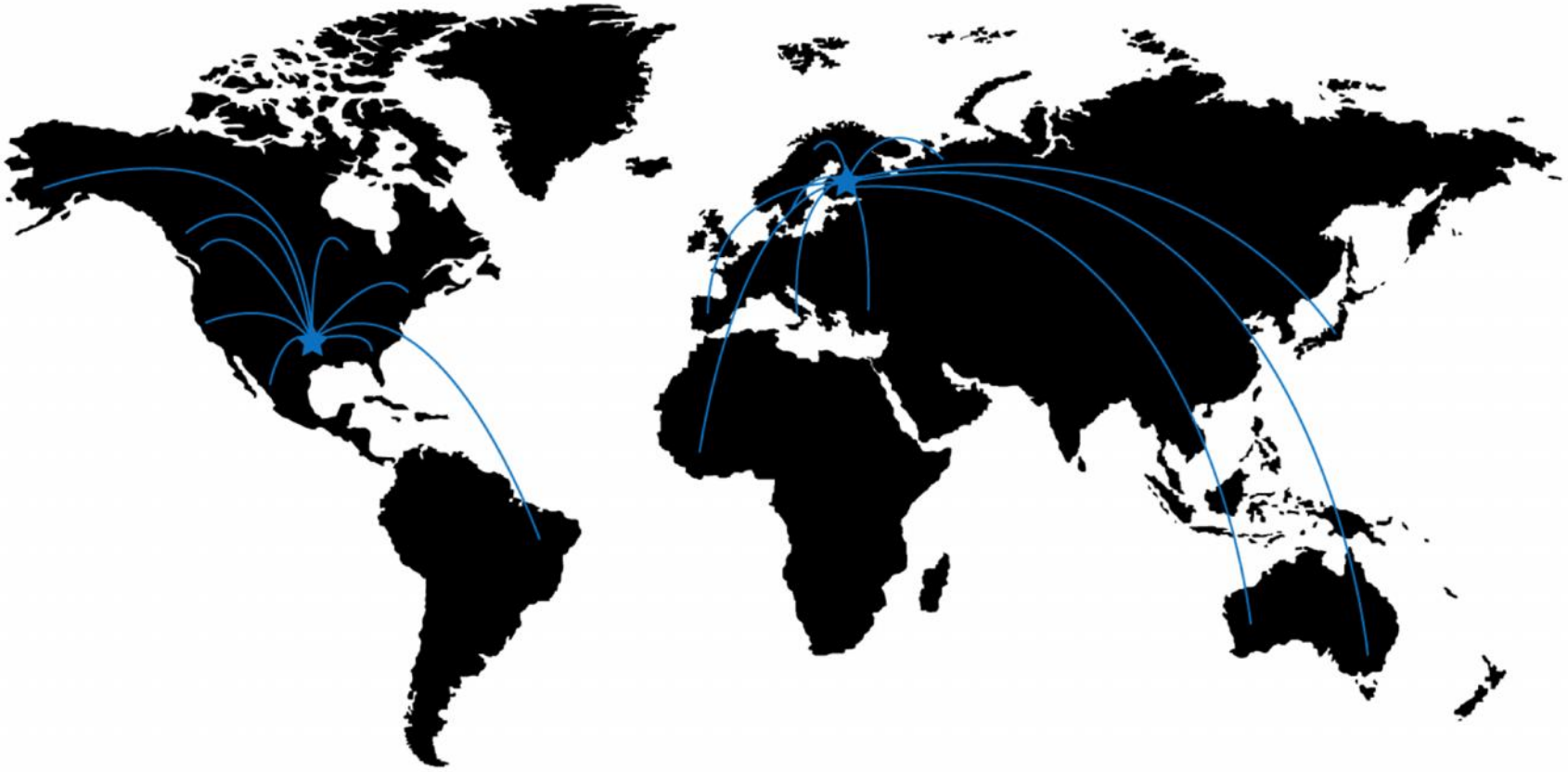
we have

OFFICES IN **NORDICS** & **US**

we have customers of

ALL SIZES

IN 100+ COUNTRIES



customers & INDUSTRIES

we have

CUSTOMERS IN MANY INDUSTRIES

- ELECTRONICS — SAGEM
- SOFTWARE — sas
- MEDIA — technicolor
- ACCOUNTING — OpusCapita
- PROPERTY MGMT — BOXER PROPERTY
- GOVERNMENT
- AEC — BSA LifeStructures
- MANUFACTURING — FläktWoods
- HEALTHCARE — SIEMENS
- PHARMACEUTICAL — AstraZeneca
- MARKETING/PR — HILL+KNOWLTON STRATEGIES

recognition AND AWARDS

MAGIC QUADRANT FOR ENTERPRISE CONTENT MANAGEMENT
2012 & 2013

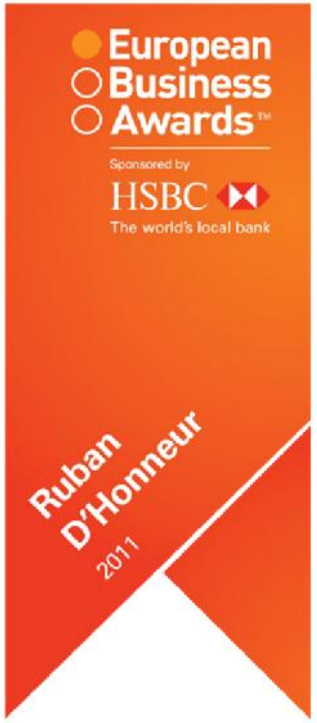
FORRESTER RESEARCH ECM WAVE
2013

DELOITTE TECHNOLOGY FAST 500 EMEA
- FINALIST 2010, 2011 & 2013

TREND-SETTING PRODUCT OF THE YEAR
2012

CONTENT MANAGEMENT FOR KNOWLEDGE WORKERS VENDOR LANDSCAPE REPORT- "MARKET PILLAR"
2012

100 GLOBAL FINALIST
2010



Who is M-Files?

An emerging ECM vendor focused on **metadata-powered** information management

Comprehensive Use of Metadata

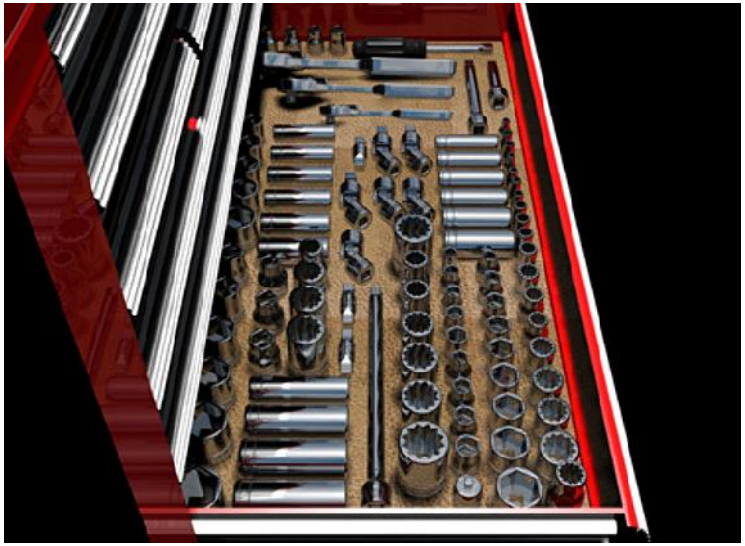
- Navigation (and Search)
- Permissions
- Workflow
- Replication

What was the innovation?

What is it?

- A wrench
- Combination wrench
- 7/8"

But where did you put it?



Where's Waldo? (Where's Wally - UK)

So who is Waldo/Wally?

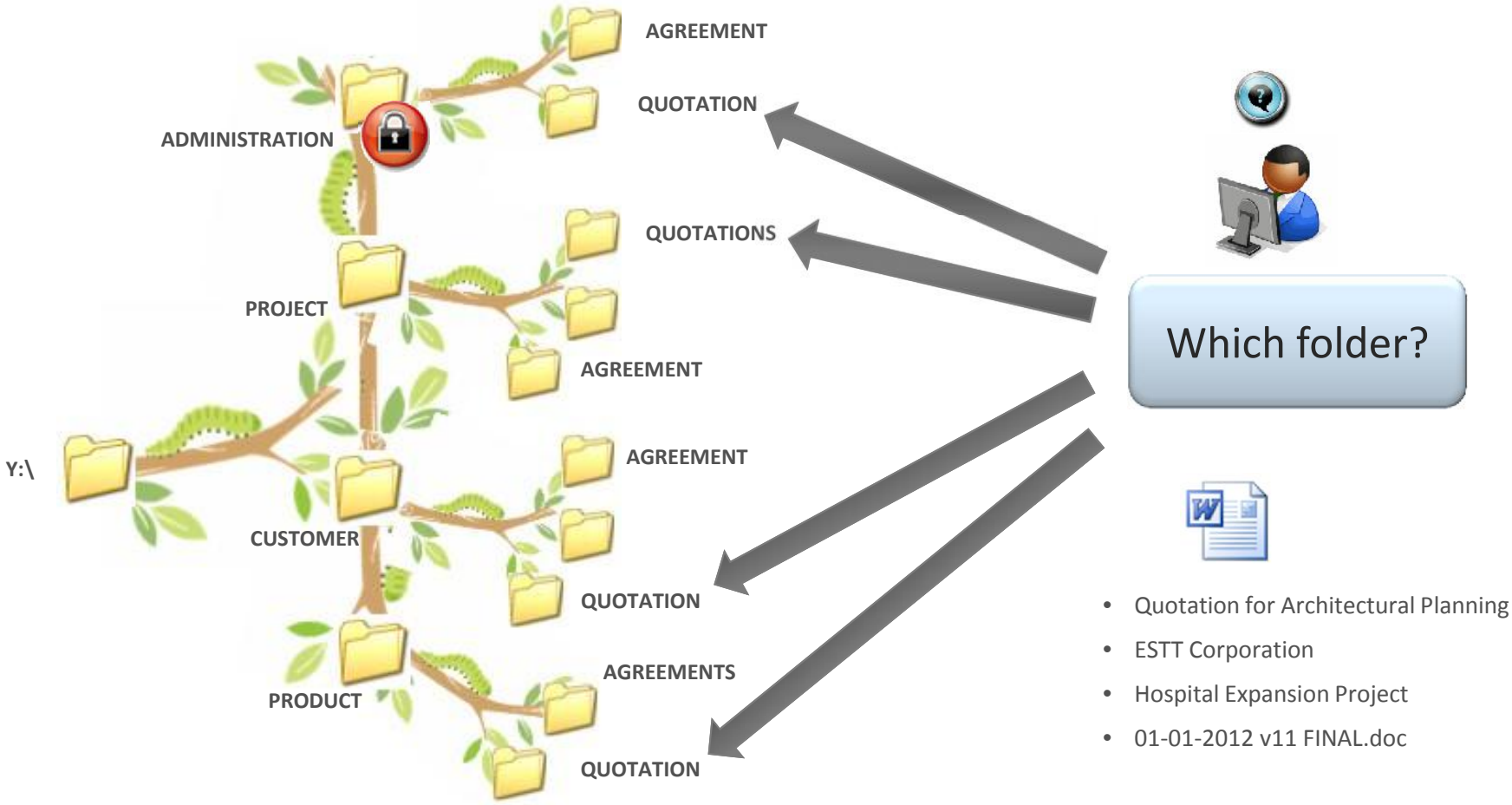
- Red-and-white-striped shirt
- Bobble hat
- Glasses
- Brown hair
- Skinny
- Sometimes carries a cane

What Does Going "Folderless" with Metadata Mean?

Classifying information by…

"What" it is rather than "Where" it is stored

Folders: Paper Archive Disorder Goes Digital



Take the iPhone…

What is Metadata?

Information about information

- Type or Class
  - Proposal, quotation, invoice
- Customer
- Project
- Dates
  - Created, Effective, Renewal
- Status
  - In Review, Approved, etc.
- Retention period

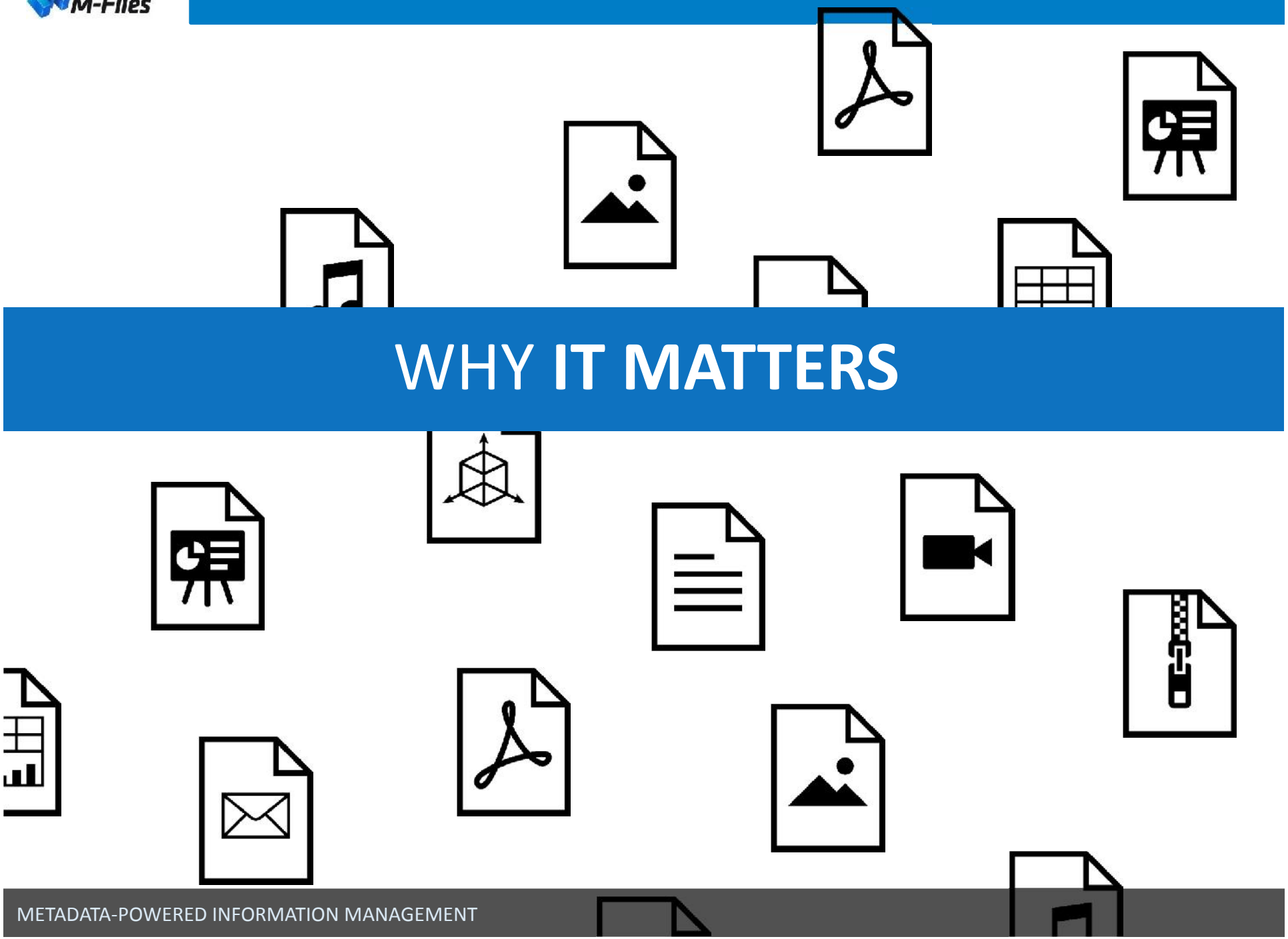
Proposal.docx

Proposal - Web Site Graphics for ESTT
Proposal ID 417, version 2

Document date:	1.6.2009
Customer:	A&A Consulting (AEC)
Project (filtered):	Austin District Redevelopment
Effective through:	30.6.2009
Accepted:	
Proposal number:	7742
Keywords:	
Description:	

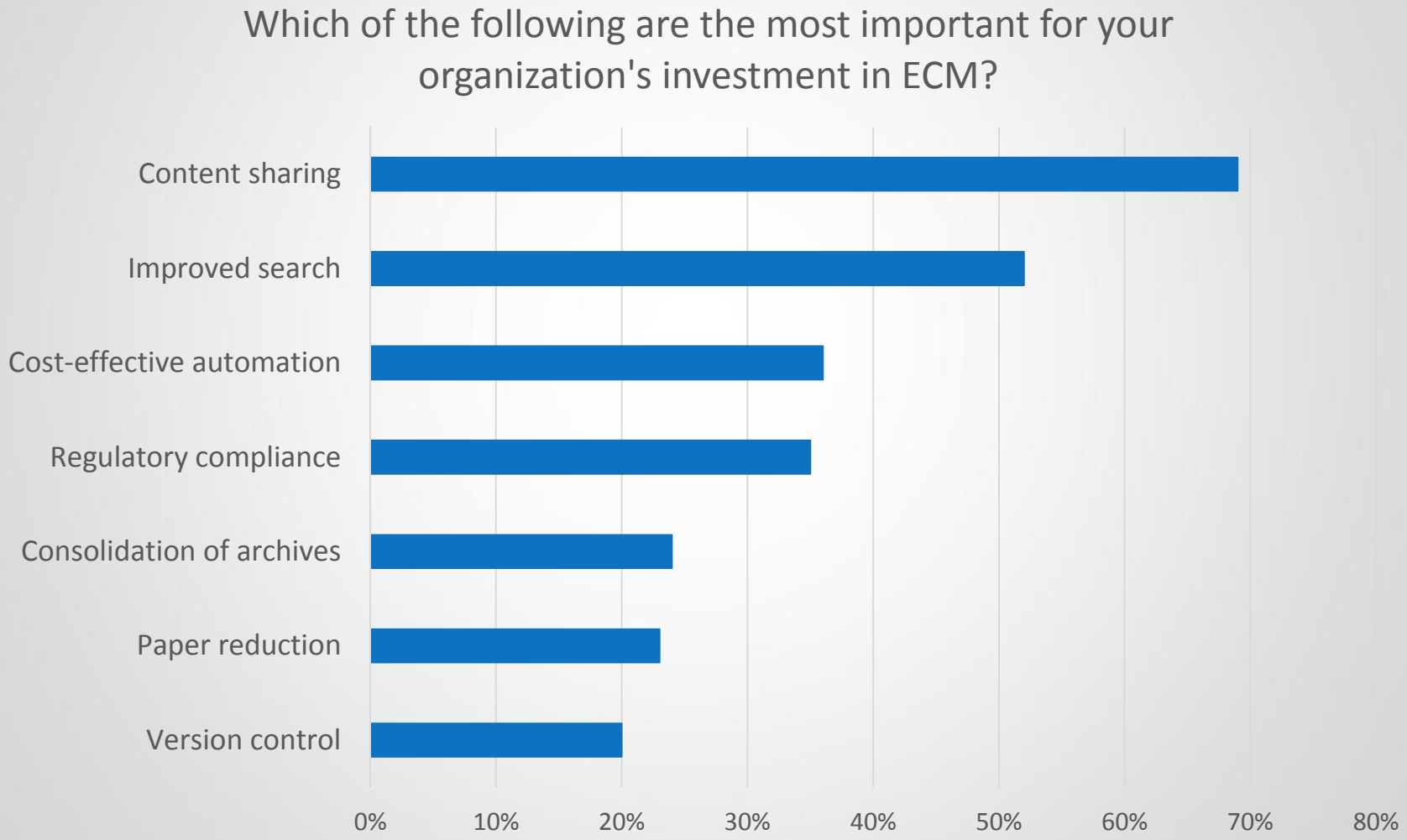
- Typical use case is simple tagging: helpful for search, but…

WHY IT MATTERS



M-Files®
DYNAMIC CONTENT MANAGEMENT

why ENTERPRISE CONTENT MANAGEMENT ?

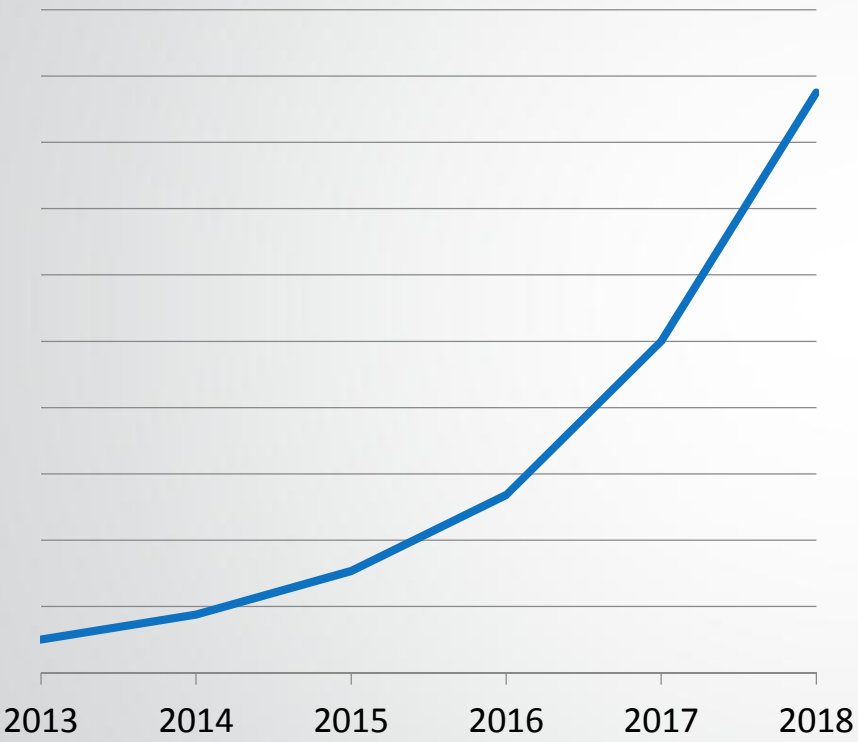


Source: Global Enterprice Content Management Online Survey, May 2013

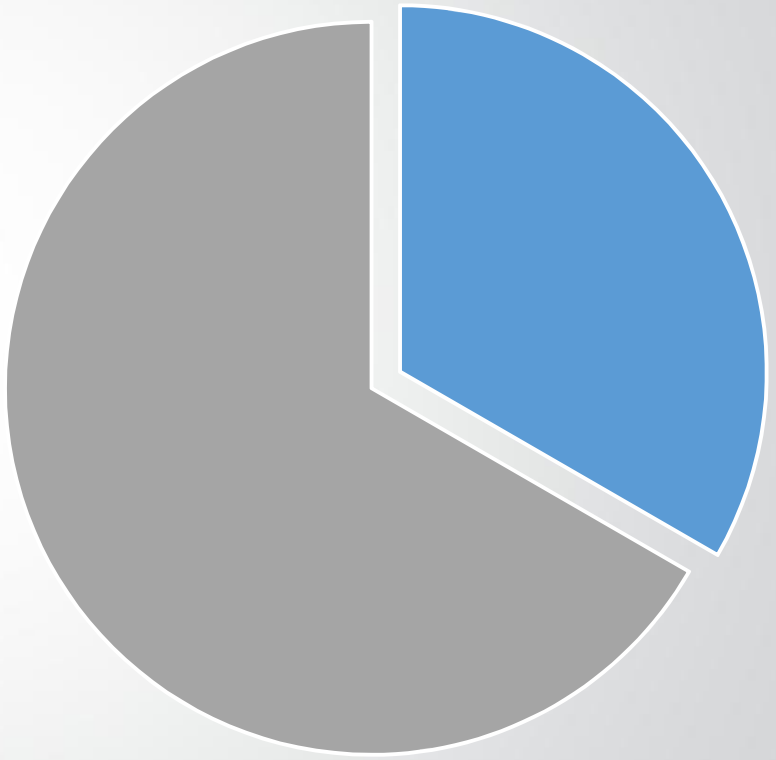
M-Files®
DYNAMIC CONTENT MANAGEMENT

why ENTERPRISE CONTENT MANAGEMENT ?

Amount of Information



Information Availability

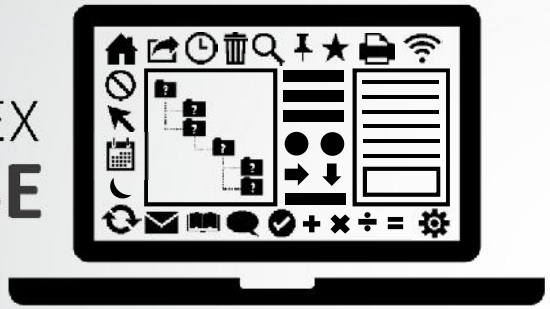


1) IDC 2010 Digital Universe Study

M-Files®
DYNAMIC CONTENT MANAGEMENT

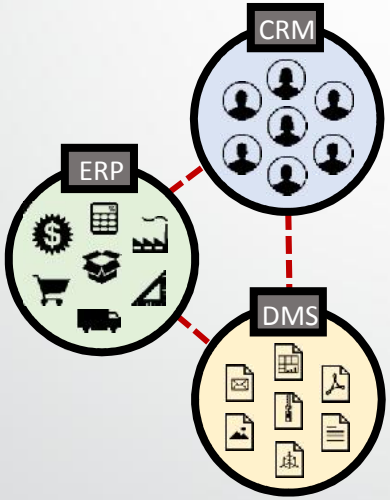
the problems
WITH MOST ECM SYSTEMS

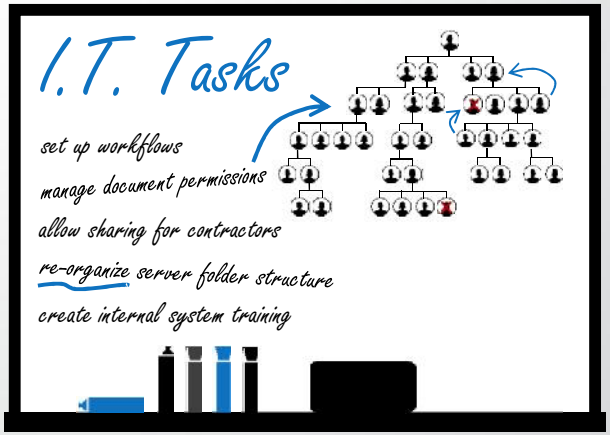
too
COMPLEX
TO USE



low
USER
ADOPTION

independent
SILOS
of
INFORMATION



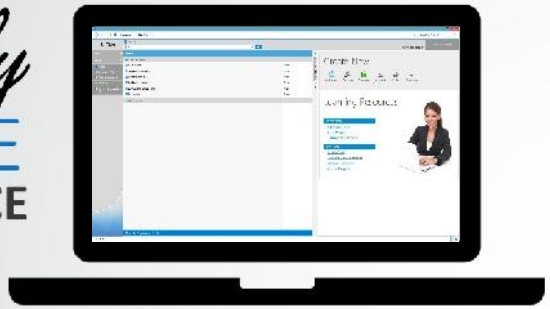


too
IT
CENTRIC

M-Files®
DYNAMIC CONTENT MANAGEMENT

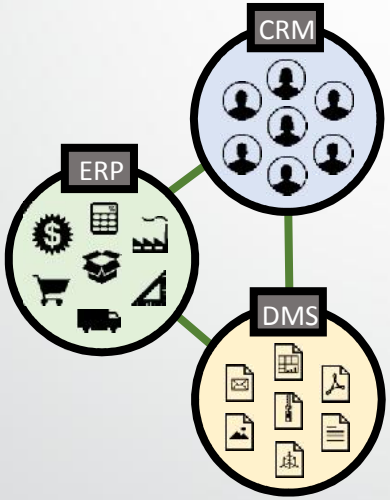
our solutions
TO THE ECM DILEMMA

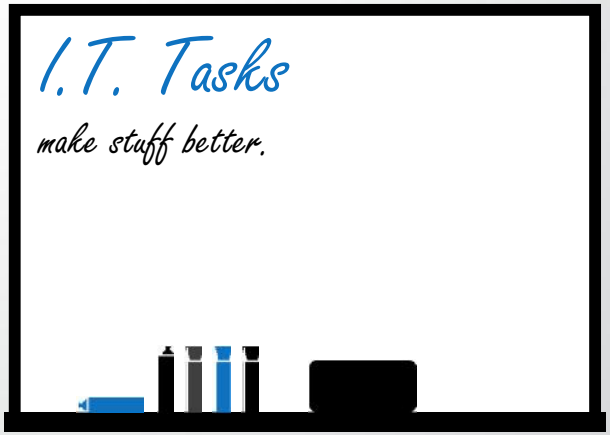
a truly
SIMPLE
INTERFACE



high
USER
ADOPTION

all of your
INFORMATION
is
CONNECTED

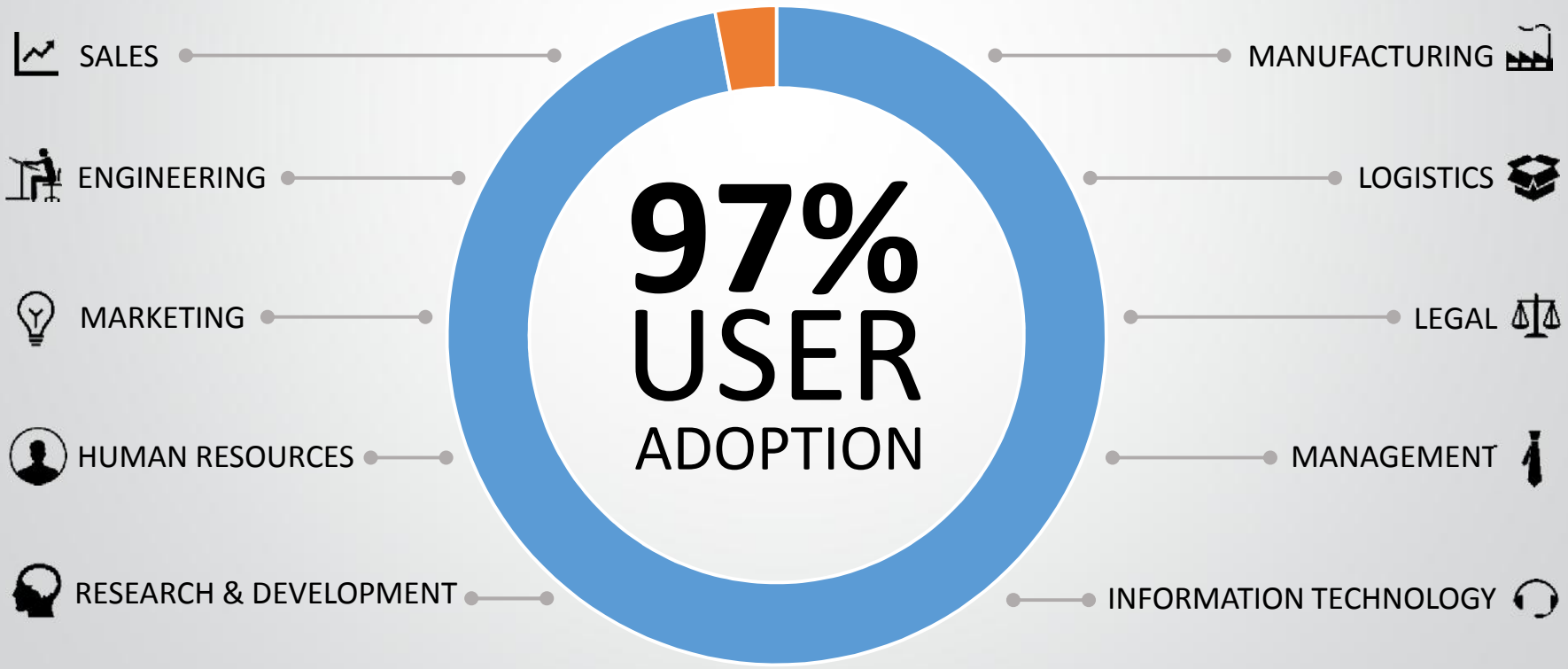




gives
CONTROL
BACK
to
USERS

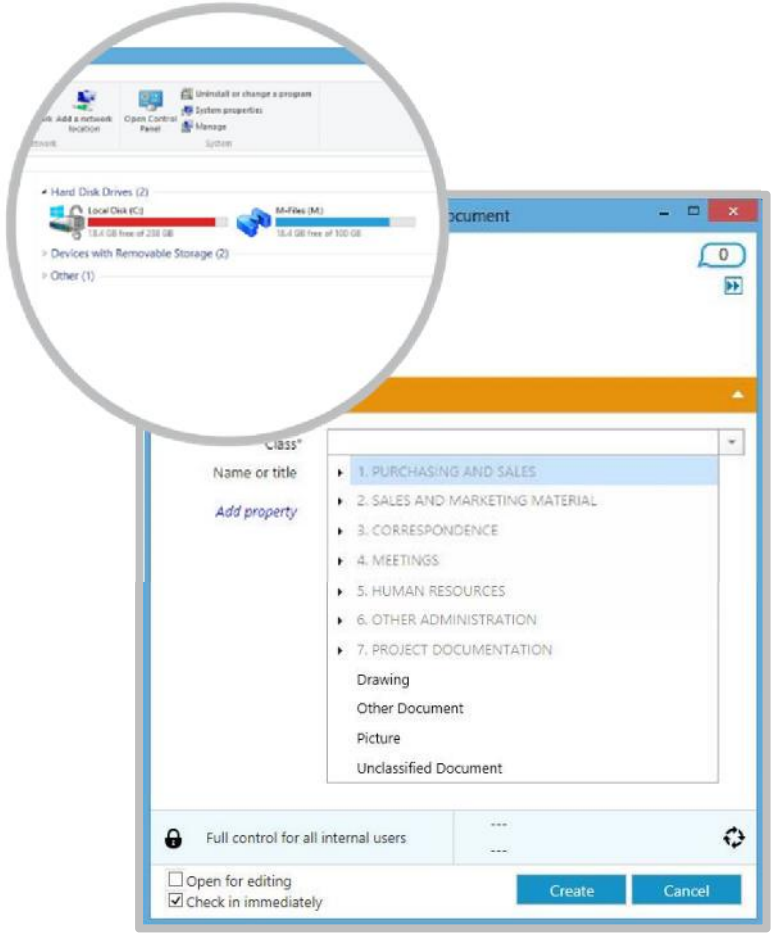
M-Files®
DYNAMIC CONTENT MANAGEMENT

everyone LIKES USING M-FILES.



saving DOCUMENTS TO M-FILES

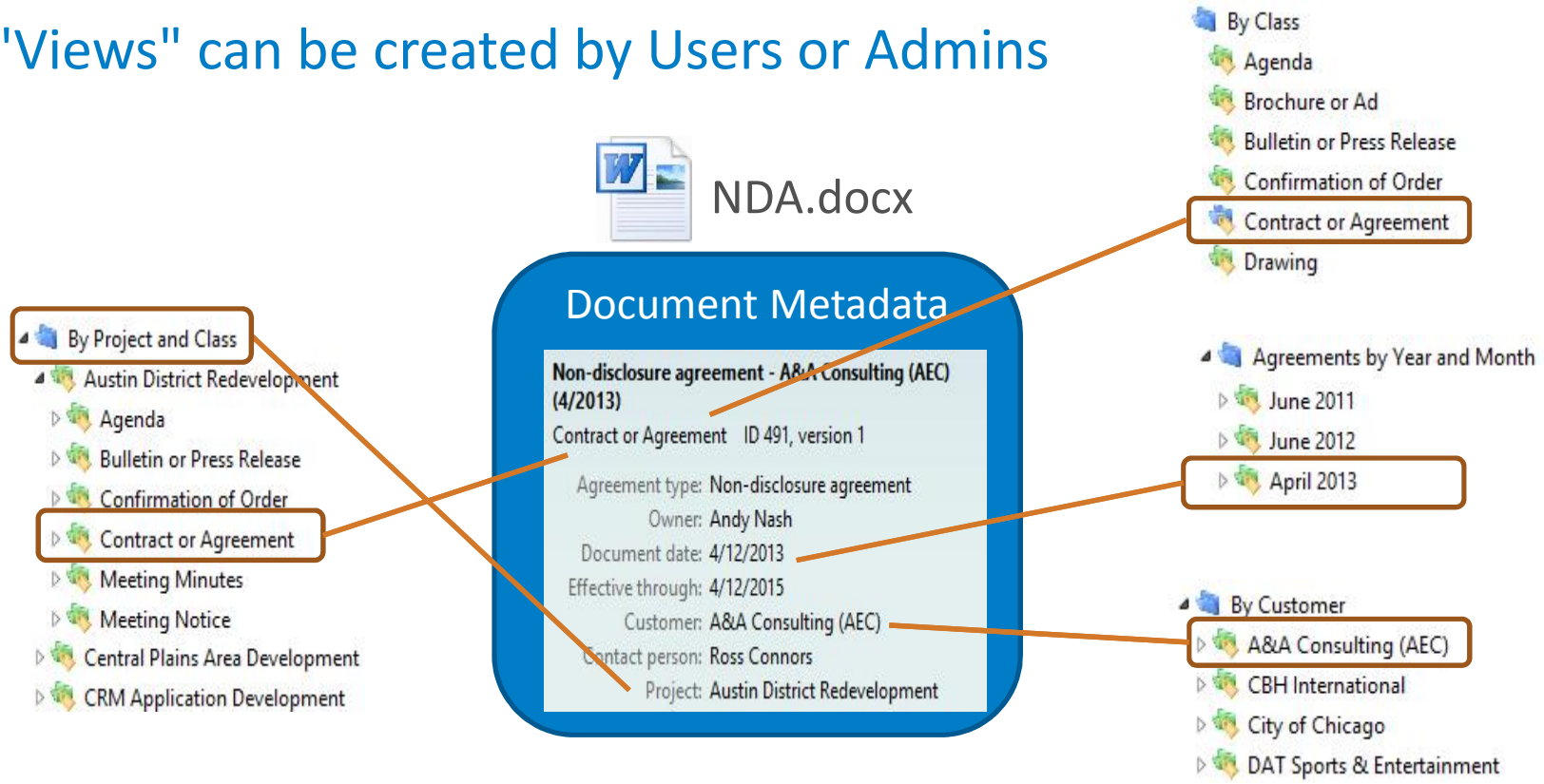
- SAVE TO THE M: DRIVE
- FILL OUT PROPERTIES
  - DOCUMENT TYPE
  - DATE
  - CUSTOMER
  - PROJECT
- ENJOY THE BENEFITS
  - LIGHTNING FAST SEARCH
  - **ONE**, ALWAYS UP-TO-DATE DOCUMENT
  - OFFLINE AVAILABILITY



Metadata-driven Navigation (aka Dynamic Views)

Documents appear in all relevant views automatically

- Only one copy, so no duplication
- "Views" can be created by Users or Admins



M-Files

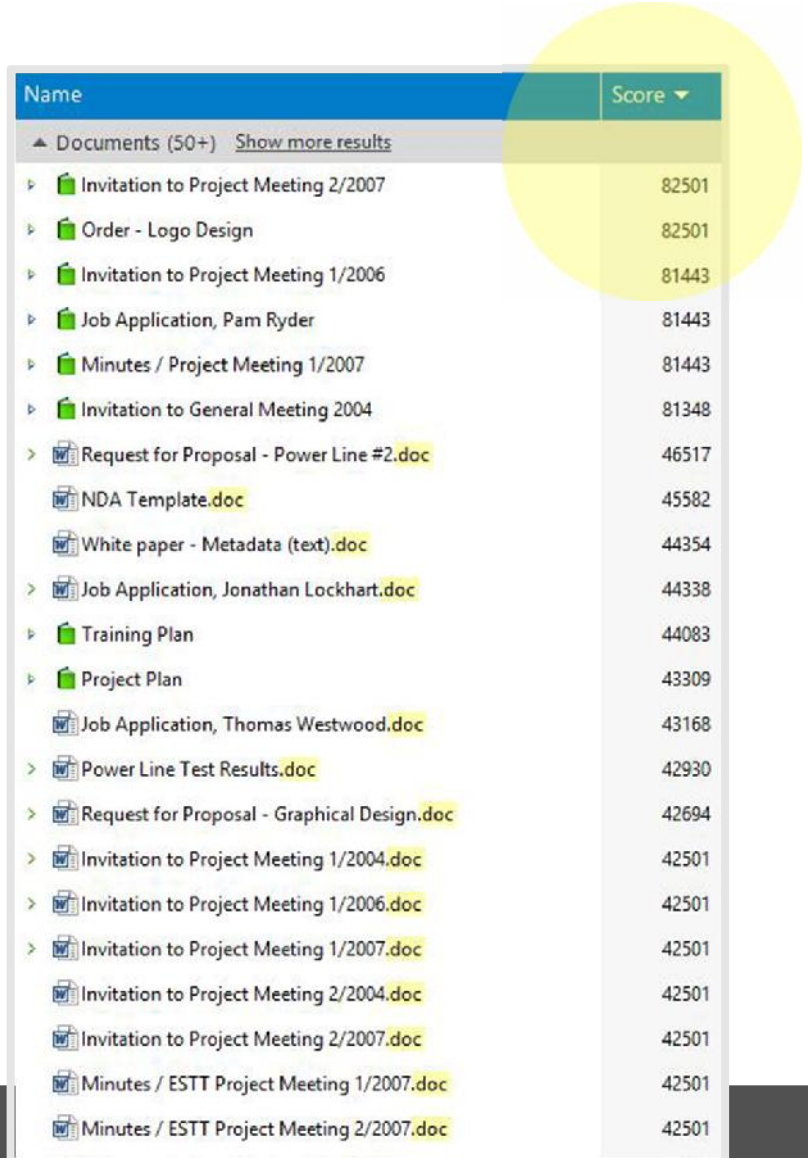
powerful SEARCH

FIND DOCUMENTS INSTANTLY

★ SEARCH RESULTS ARE RANKED BY RELEVANCY
- How recently the document was created
- How many times the document has been edited or updated

★ SEARCH INCLUDES FILE METADATA & CONTENTS

★ LOCATES DOCUMENTS QUICKLY NO MATTER HOW MANY ITEMS ARE IN THE VAULT



document MODIFICATION & COLLABORATION

edit WITHOUT FEAR OF DUPLICATION

★**CHECK OUT** DOCUMENT TO EDIT

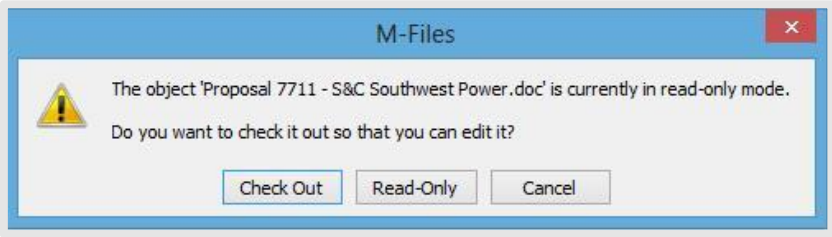
- Reserves the document for editing
- Prevents others from editing at the same time
- Others are still able to read checked out docs

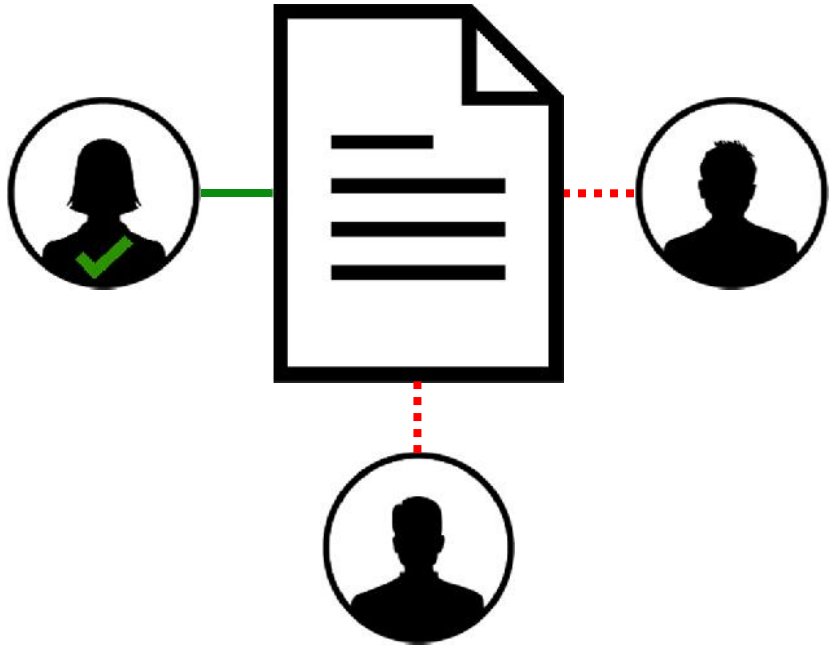
★ **CHECK IN** DOCUMENT WHEN DONE

- Once checked in, others can edit the document

★ **CO-AUTHORING**

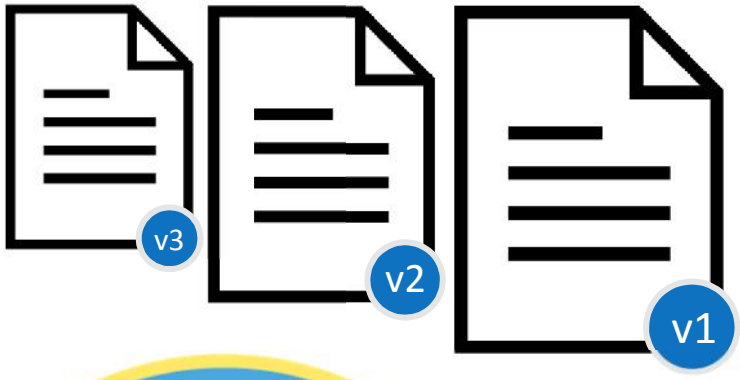
- Simultaneously edit shared documents
- Collaborate with co-workers and outside parties
- See who has made changes and what they are





version HISTORY

keep track OF ALL CHANGES



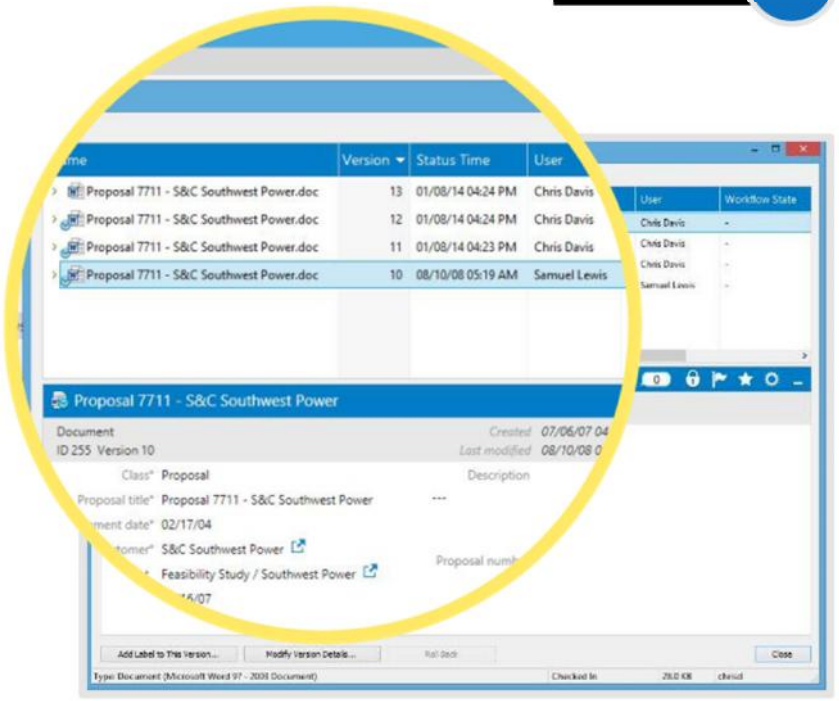
★HISTORY IS AUTOMATICALLY DOCUMENTED

★ VIEW PREVIOUS VERSIONS ANY TIME

- Eliminates the risk of accidental data loss
- Traceability ensures quality standard compliance in regulated industries

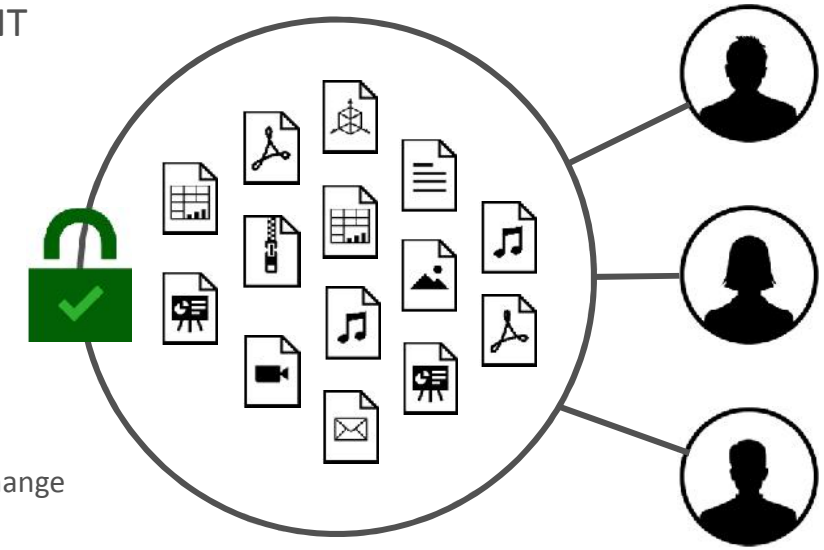
★ EFFICIENT USE OF HARD DISK SPACE

- Only "delta" changes are stored



permission MANAGEMENT

welcome TO THE INDUSTRY'S **MOST ADVANCED** PERMISSION MANAGEMENT



★ USER & USER GROUP RIGHTS
- Per Document
- Per Document Class

★ METADATA-DRIVEN PERMISSIONS
- Enables automatic changes to access permissions with any change in metadata, such as when a document is approved or project team members change

★ SIMPLE SETUP & ADMINISTRATION

★ ACTIVE DIRECTORY SUPPORT

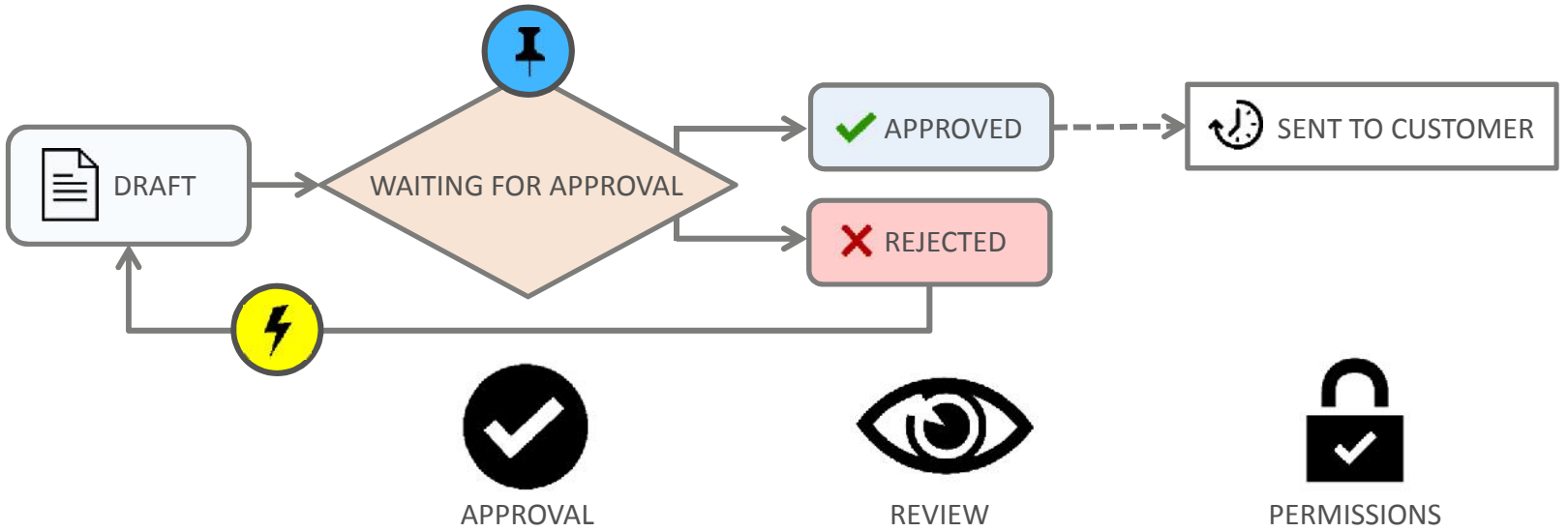
flexible, compliant WORKFLOWS

★ AUTOMATE BUSINESS PROCESSES

★ HERE'S AN EXAMPLE: **PROPOSAL**

NOTIFICATION

ASSIGNMENT



mobile ACCESS

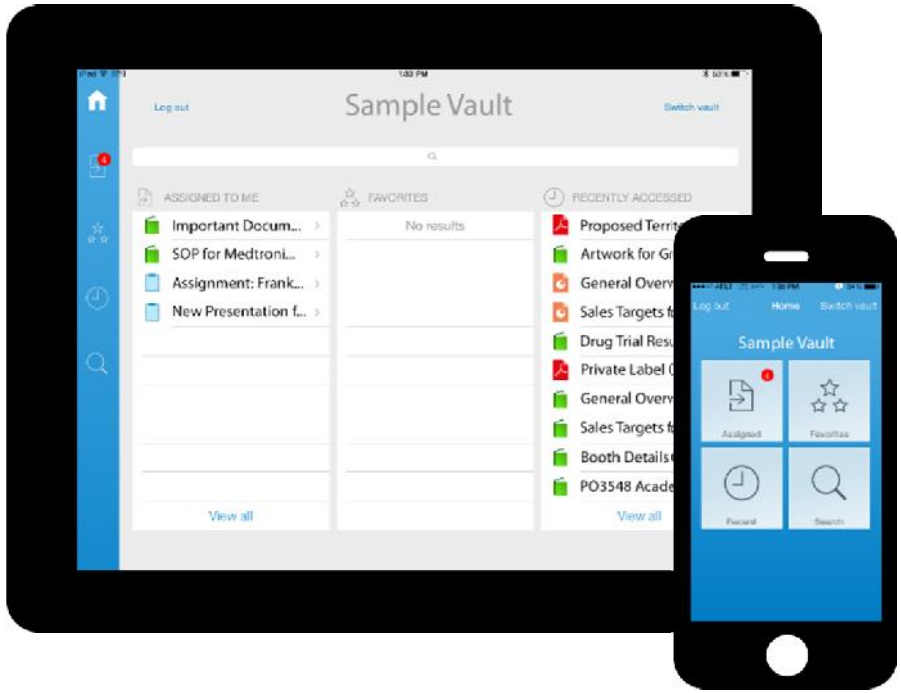
access EVERYWHERE

★ MOBILE APPS FOR MOST DEVICES
- iPhone/iPad
- Android devices
- Windows Phone

★ VIEW DOCUMENTS

★ MANAGE WORKFLOWS

★ E-SIGNATURES



INSTALL THE APPS **NOW** FROM:

Available on the iPhone App Store

Google play

Windows Store

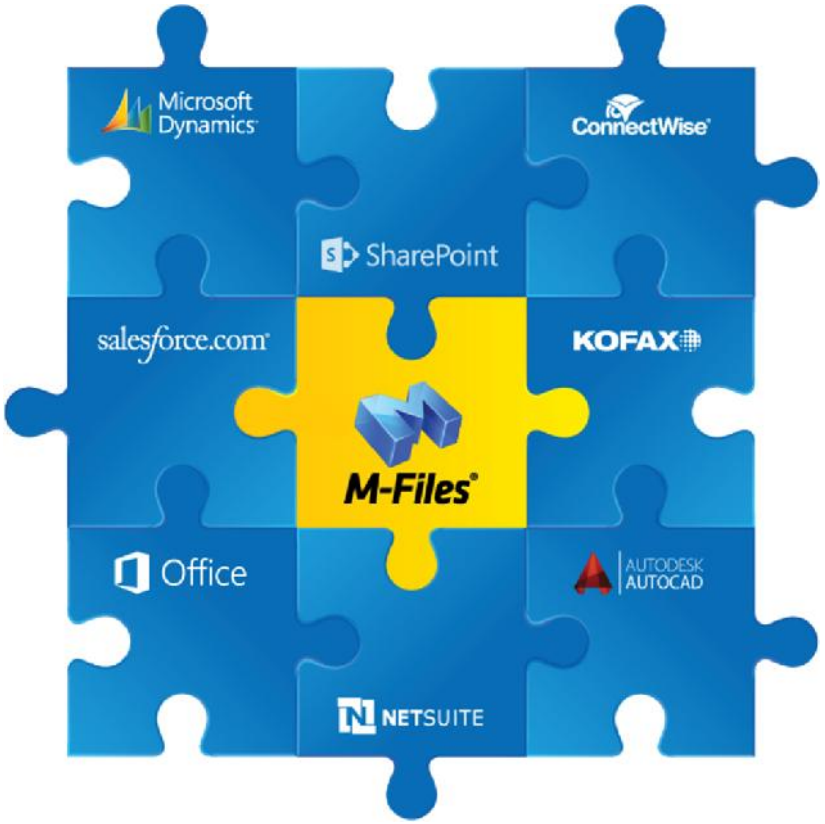
integrating THIRD PARTY SOFTWARE

we play nice WITH OTHERS

★ M-FILES INTEGRATES WITH:

- Microsoft Dynamics CRM
- Microsoft Sharepoint
- Microsoft Office
- Salesforce
- NetSuite
- Autotask
- Autodesk (AutoCAD & Revit)
- Kofax Express
- Sage
- ReadSoft
- SAP

★ THE M-FILES API CONNECTS TO VIRTUALLY **ANY DATABASE OR WEB SERVICE**



integrations are simple and easy = COST EFFECTIVE

WE ARE **DIFFERENT**

what's DIFFERENT?

METADATA-DRIVEN (WHAT VS. WHERE)

FLEXIBLE DEPLOYMENT: CLOUD, ON-PREMISE, HYBRID

SIMPLE, YET HIGHLY CONFIGURABLE ECM

INSTANTLY FAMILIAR (INTEGRATED IN TO WINDOWS)

INTEGRATES WELL WITH OTHER SOFTWARE

ACCESSIBILITY ON EVERY DEVICE

Thank you!