Object types
Object types

- It is recommended to create a new object type for managing items that do not necessarily contain files:
  - Customer
  - Project
  - Support Ticket
  - Reclaim
  - Contact event
Object types and objects 1/3

► New objects can be created:
  ▪ By users
  ▪ By importing them from an external source

► There are two built-in object types in M-Files
  ▪ Document
  ▪ Document collection
Object types and objects 2/3

- Managing all object types is similar to managing documents
  - Document is just a special type of an object

- Objects have version history

- Objects can have 0, 1 or several files
  - Usually only Document objects include files

- The view and edit permissions of the objects are determined using permission settings
  - Who can view/and or edit the object?
  - Who can create new objects?
  - Who can see the object type name?
Object types and objects 3/3

► Every object type has a unique ID
► Every object has a unique ID
► You can create links to objects with M-Files URLs
  ▪ Links are based on the document vault identifier (GUID), object type ID and object ID
  ▪ Links can refer to the latest version of an object or to a specific version
Dependencies between objects:

**subtypes**

- Objects can have subobjects
  - e.g. customers and contact persons

- Subobjects always have an owner
  - When creating a subobject, the owner must be determined

- It is easy to navigate from owner object to the subobjects of it

- Owner can be a value list item and the subobject an object and vice versa
Dependences between object:

relationships

► There can be relationships between objects

► Relationships describe to which objects the object is related to

► Relationships have direction:
  ▪ relationships from this object
  ▪ relationships to this object

► Relationship can refer to the latest version or specific version of another object
Importing objects from external systems

► Usually new objects are created by users with *M-Files Client*

► New objects can be also created by importing them from external systems

- Databases
- Mail servers
- File systems / File servers
- Scanners
Parallels between value lists and object types

► Both can be used to create drop-down menus on the metadata card

► Both can retrieve their contents from an external database

► Two value lists or object types can have a hierarchy
  - city and postal code
  - product group and product
  - customer and contact person
Differences between value lists and object types 1/2

► Objects have more metadata
  ▪ Value lists only have the name

► Objects are shown in search and view result listings
  ▪ Value list items can be seen only as metadata of an object or as virtual folders of views

► Objects have a version history

► Objects can have multiple classes and properties
Differences between value lists and object types 2/2

► Objects can be submitted into a workflow
► Objects can be assigned
► Objects can be referred to using M-Files URLs
► Objects can be modified with M-Files Client
► Automatic values of properties can be used with objects
► Objects can be deleted and destroyed
Exercise 1

Create new object types:

- Project
- Customer
- Contact person
Exercise 2

- Set the Contact Person as a subtype of the Customer object type
Exercise 3

- Rename *Project* (Generic) class to *Customer project*
- Create a new class *Internal project* under Project object type
Exercise 4

- Add the following properties to project classes:

  - Customer project
    - Name or title
    - Customer
    - Project manager (Choose from list "Users")
    - In progress (Yes / No)
    - Description

  - Internal project
    - Name or title
Exercise 5

► Add the following properties for the class Customer (Generic):

- *Name or title*
- *Address* (text)
- *Postal code* (text)
- *City* (text)