Importing Files and Folders to M-Files

Client-side features

One of the first questions new users of M-Files ask is how should they import their existing files from local drives or network drives into the M-Files vault.

To gain the full benefits of your M-Files implementation you should pay extra attention to make sure you specify enough metadata for your existing files. One smart way to do this is to use the client-side *"Import Files and Folders"* feature.

The "Import Files and Folders" feature allows you to easily import multiple 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.
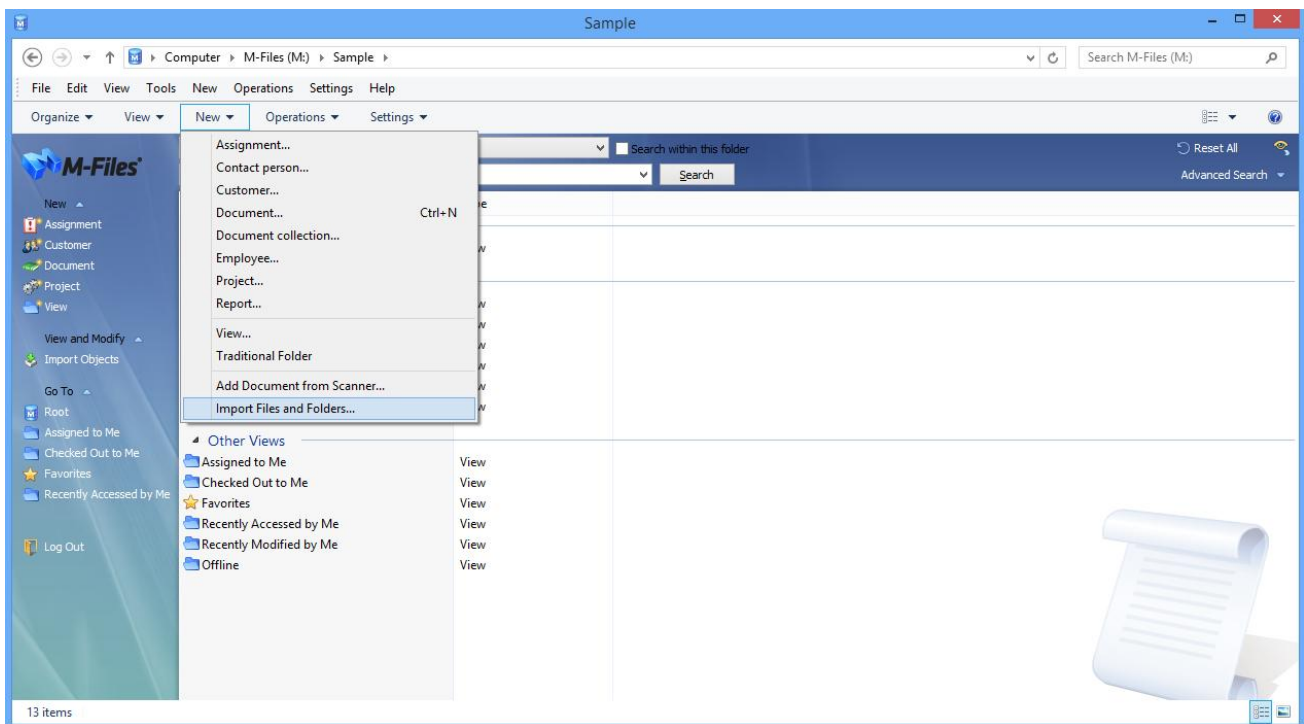

Figure 1: Selecting the Import Files and Folders Command
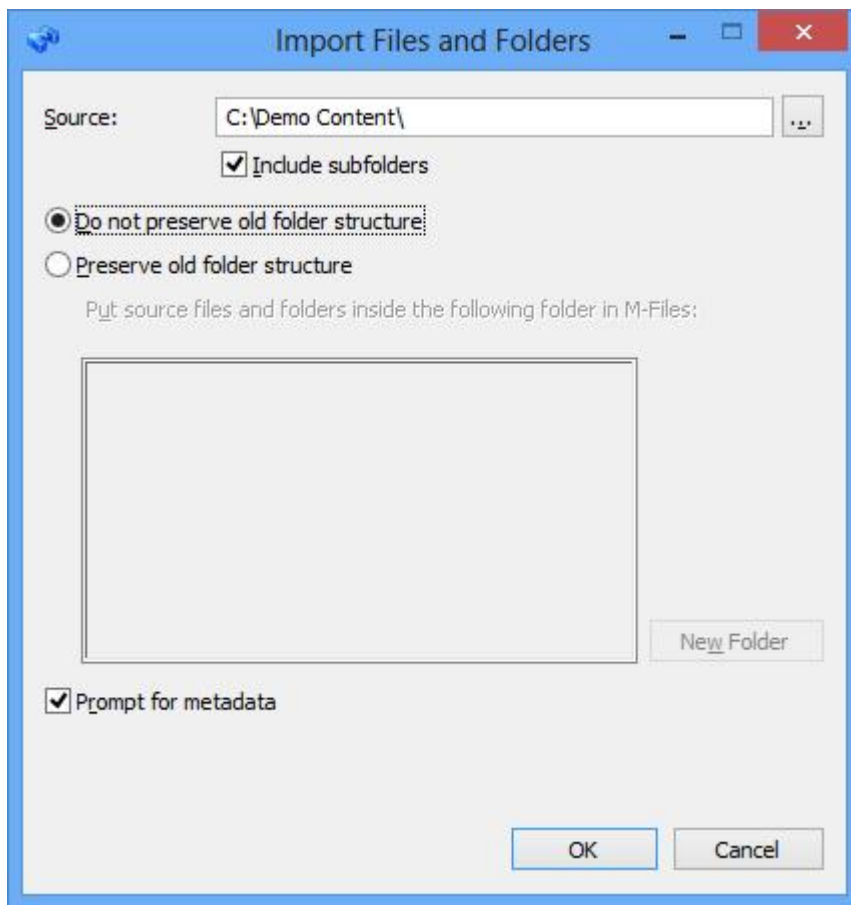
Options in the Import Files and Folders Window

Figure 2: Import Files and Folder Dialog Box

Source

Defines the folder where imported documents reside. This can be either a local or network drive.

Include subfolders

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

Do not preserve old folder structure

If you wish to transfer the files to M-Files without preserving the folder structure, select this option. The imported documents will now appear, as usual, in M-Files views sorted by their metadata.

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

You can continue to use the old folder structure also in M-Files if you choose this option. However, it is strongly recommended to specify metadata for the imported files and use views for navigation instead.

Using the traditional folder structure alone makes finding documents more difficult and on the other hand specifying both the folders and metadata just adds extra burden to the user.

Prompt for document properties

Choose this option to add metadata for imported files. It is important to specify at least the key metadata properties, such as document class and customer or project to the imported files.

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 or additional server-side tools to import large amounts of documents with existing metadata. Alternatively, you can also choose to import files from network folders using the Connections to External Sources / File Sources feature in M-Files Server Administrator. Please contact your M-Files representative for more details.