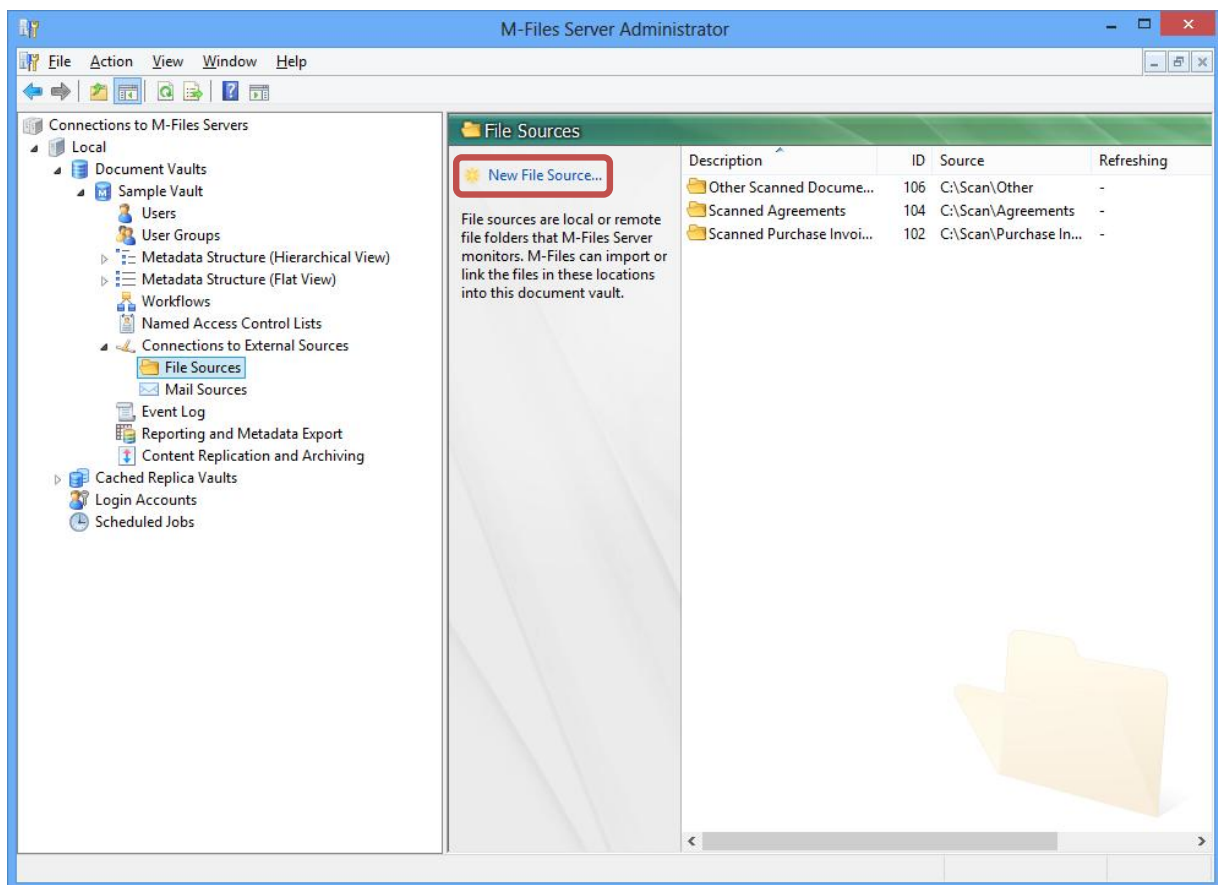# Connections to External File Sources

By using *connections to external sources* you can significantly speed up the process of getting up and running with M-Files and importing existing data. For instance, you can, import folders from a shared network drive to M-Files and start managing the documents and their versions in M-Files.

To create a new connection, open M-Files Server Administrator and navigate to Vault → Connections to External Sources → File Sources and select the "New Files Source" feature (see below).
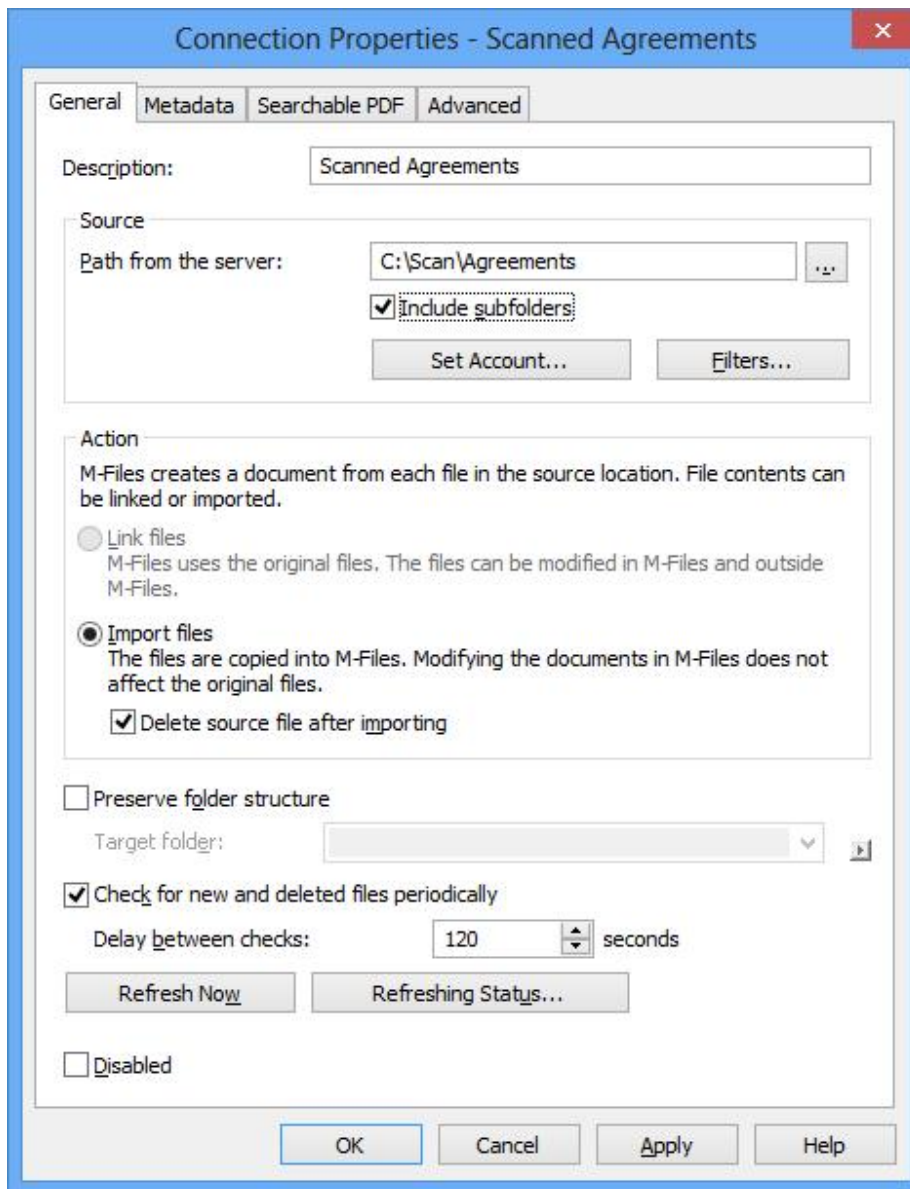

Scanner integrations

This feature is often used to create a link between M-Files and network scanners.

Some network scanners let users to enter metadata for scanned documents using the touch screen on the device. This metadata can then often be saved to an XML file and parsed with M-Files.

With the M-Files OCR add-on you can covert the scanned documents to searchable PDFs and hence make them searchable by their content in M-Files.

Connection Properties

General Properties Tab

You can define the following settings in the General Tab:

Description

The name of the connection. All files imported using this connection will be automatically assigned with metadata property Created from an external source. The value of this property equals to the description of the connection name.

Source

Path from the server

The location of the imported files. Notice that this location is accessed by M-Files Server service process identity that by default is Local System Account. This means that the service cannot usually access mapped network drives by the file path so you need to use the UNC paths instead (e.g. \\server\sharename\).

Include subfolders

Check this box to connect the entire hierarchical folder structure to M-Files.

Set Account

Specify an account for M-Files to use for processing files from the specified external location. This setting is usually needed when importing files from a shared network folder. By default, M-Files uses the Server service identity (i.e. Local System Account) to access the source.

You can specify another user account that is used to access the location. The best practice, however, is to let, M-Files Server computer identity to access the share instead.

Filters

Define the files to be processed. For example, you can include all filed with the extension PDF by entering *.pdf in the include files list, and exclude all files with the extension TMP by entering *.tmp to the filter's exclude files list.

Action

Link files

This option should be used only if the files need to be accessed without M-Files software. Such examples may include for instance the use of certain 3D CAD software where the assembly consists of multiple files and the software relies on the traditional folder structure when defining the relationship paths between the files.

The downside of using the link option are:

- In ability to control access of the files with M-Files permission settings. On the other hand the permission settings in the network folder are not respected in M-Files
- Audit trail is lost since the documents can be accessed from outside M-Files
- Version history may not be complete
- Check out / Check in feature is not fully supported
- Administrators need to backup both the network folders and M-Files vaults
- The limitations of Windows Explorer encourage those users that mainly access the files via shared folder to manually manage versions and hence files are easily duplicated.

Import files

The files will be copied to M-Files. Modifying documents in M-Files will not affect the original files.

Delete source file after importing

The source file will be deleted after it has been imported to M-Files. This feature is useful, for example, when importing scanned files to M-Files.

Preserve folder structure

This setting preserves the imported folder structure in M-Files using traditional folders. The use of traditional folders is not recommended. Add-on tools, such as M-Files Document Importer at http://catalog.m-files.com/ help you to utilize the folder structure to identify metadata properties for the imported files.

Target folder

The target folder is an M-Files target folder for viewing linked or imported files.

Check for new and removed files periodically

If you enable this option, M-Files will check the source folder at predefined intervals and update according to which files and folders are new and which have been deleted. In this way, any changes made to the source folder become visible in M-Files as well.
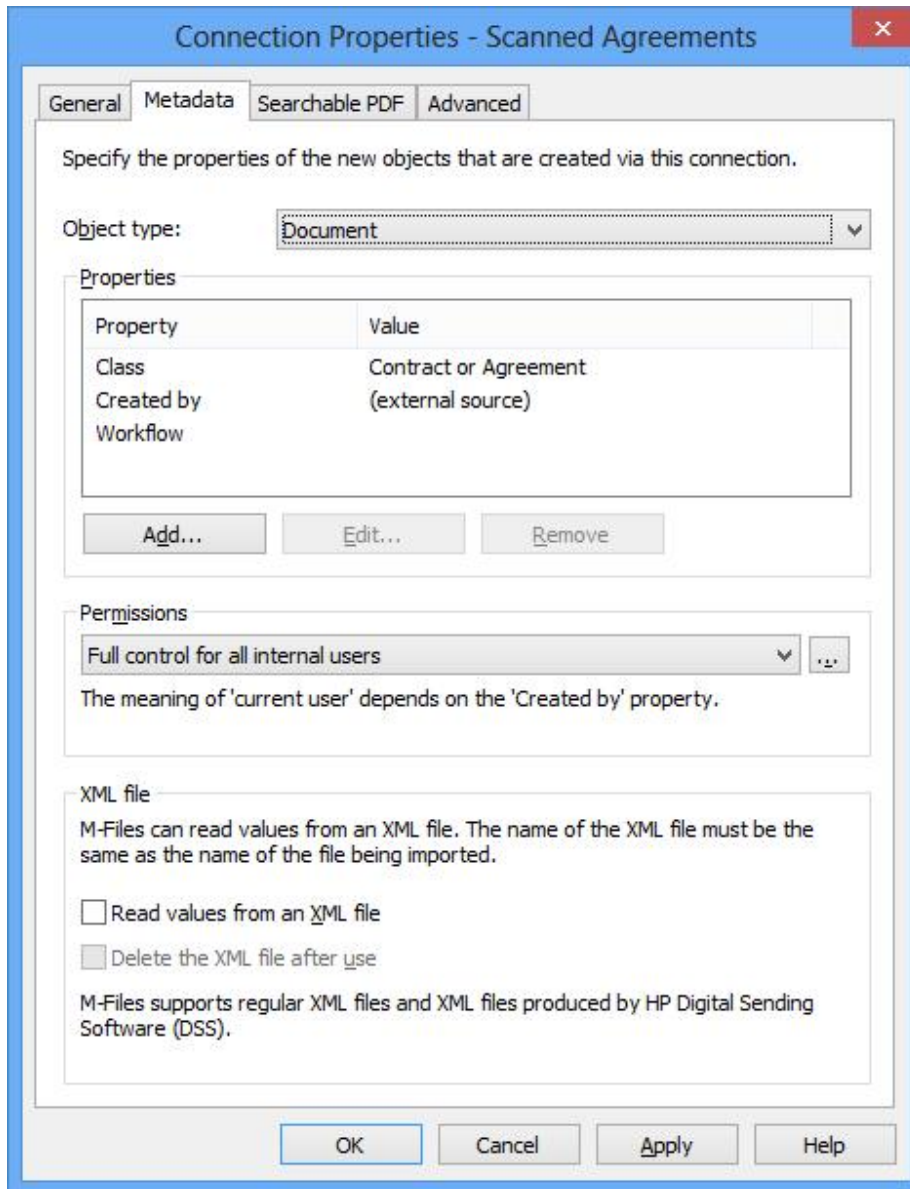
Refresh Now

Refreshes the source folder immediately.

Disabled

Disables the connection

Metadata Tab

In this tab you can specify the properties for the imported files.

Object type

Define the object type for the imported files. Typically you import documents with this feature but sometimes if maybe useful to import for example legacy email messages as customer feedback or activity objects in CRM implementation.

Properties

Define the properties to be assigned to the imported files. The property values can be either fixed, or read from an XML file or read from an image file using the zonal OCR feature.

Permissions

Set the permissions for the imported documents. Notice that metadata-driven properties can override this configuration.

Notice that the OCR option is only available if you have purchased M-Files OCR add-on and installed the required files on the server.

XML file

M-Files can read values in XML files. The name of the XML file must match the name of the file to be imported. If you want M-Files to read property values in XML files, select the *Read values from an XML file* option. M-Files can also delete the XML file after use.

Supported file formats:

- regular XML data
- XML data output by HP Digital Sending Software (DSS)

With HP DSS, you can define, for example, the *Customer* value to be input by scanner. If you want M-Files to utilize the input information, set up M-Files to read the property value in the HP DSS XML file and name the value *Customer.* With regular XML, use an XPath statement to define the relevant location. XPath is a W3C standard syntax for defining locations in an XML document.
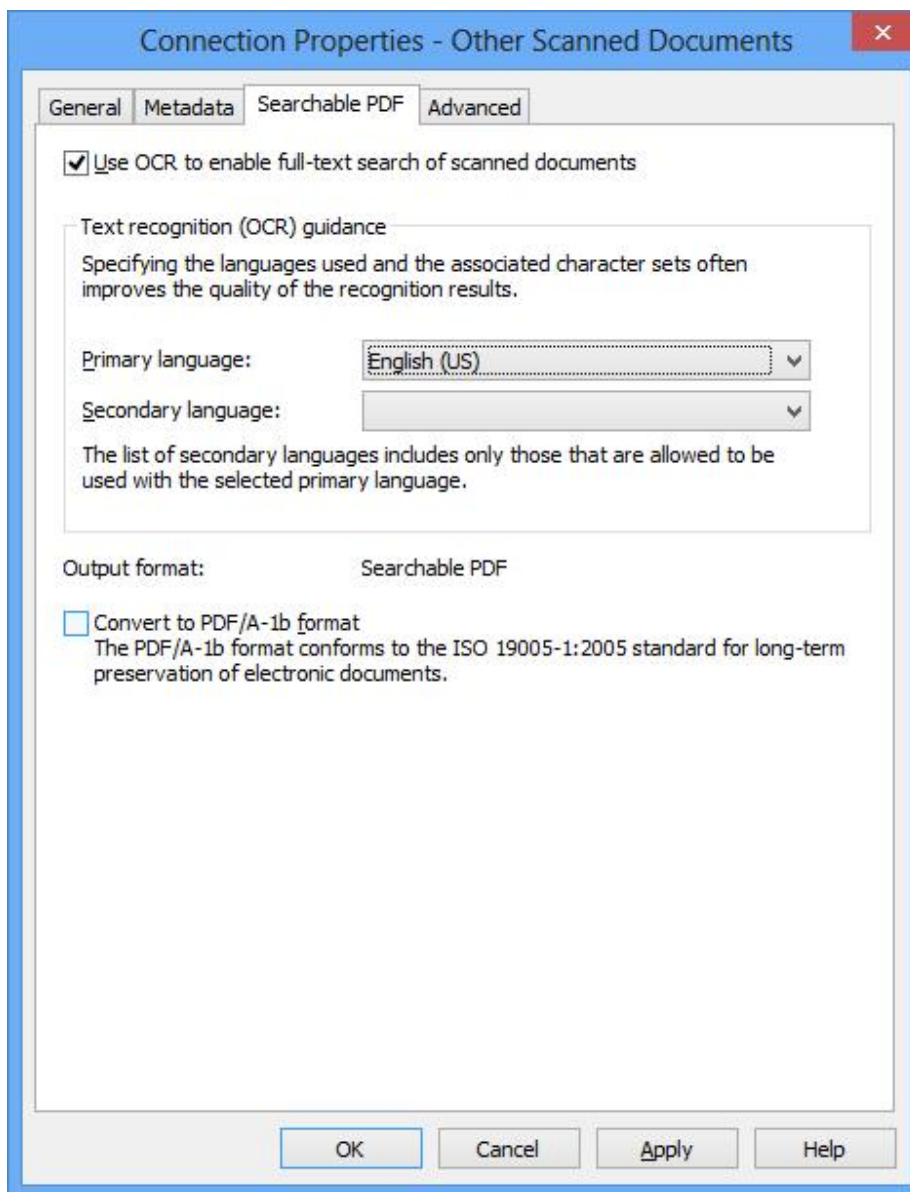
Searchable PDF Tab

This tab is only available if the OCR module has been activated on your license code and if you have installed the OCR module on the server computer.

You can use the OCR module to convert image files to searchable PDFs. The searchable PDFs are indexed by M-Files Server and are therefore searchable by their content.

The primary and secondary language settings help the OCR engine to improve the character recognition accuracy by taking the special characters of different language into account and by trying to match the optically recognized words to dictionaries.

The Convert to PDF/A-1b option lets you to import files to M-Files in the long-term archiving compliant format.

Advanced Tab

You can define aliases for the connection description. The aliases can be used when accessing M-Files via M-Files API.