M-Files Corporation

► Entered Document Management market in 2005

► Headquarters in Texas and Finland

► Global customer base
  ▪ Thousands of customers, 80 countries, 24 languages
  ▪ Companies of all sizes

Companies served:
- Accounting & Financial
- AEC
- Education
- Insurance
- Legal
- Manufacturing
- Medical
A few of our customers...
Why Document Management?

► Data is scattered and hard to find.

- Chaotic collections of network folders, duplicates on local hard drives
- Email attachments
- Paper documents
- Databases
- External media

• Inefficient document processing and collaboration.
  ➔ If it costs $1 to produce a document, it costs $10 to process and share it.1

1) Kevin Craine: Design a Document Strategy
Why Document Management?

PROBLEMS WITH FOLDER STRUCTURES

- Inflexible and static; no support for alternate structures
- Files may reside on individual PCs, in email attachments and on paper, averaging **19 copies** per document.1
- Inefficient search capabilities; "professionals spend up to 50% of their time looking for the right information."2
- No automatic version history (a basic requirement of quality systems and compliance.)
- No support for organizational changes, such as growth, personnel changes, new business lines, etc. *(Up to 70% of documents are recreated.*)

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1) International Data Corporation (IDC)
2) "8 Reasons You Need a Strategy for Managing Information -- Before It’s Too Late," by John Mancini, AIIM President
Easy Integration with Other Systems

Data is often scattered in different IT systems
- ERP
- Accounting
- Billing
- Recruiting

M-Files integrates easily with existing business systems
- Flexible interface to connect to external systems requires no programming
- M-Files API supports even the most demanding integration requirements
- Enables tagging documents to objects in company systems CRM, ERP, Accounting, etc.
M-Files Ease of Use

► Seamless Windows Integration

► Simply click Save... to use M-Files!
Document in M-Files

- Document can be classified during save operation
  - Simpler and faster than using folder hierarchies
- Classification structure is centrally managed
- Consistent data and efficient document control

1. Save to the M: drive (from any Windows application)
2. M-Files properties
   - for example: Document type, Date, Customer, Project
3. Benefits (for organization and user)
   - for example: Immediate finding, Automatic versioning, Offline availability, Document re-use
Dynamic Views

Documents sorted by projects.

Documents sorted by customers.

Documents sorted by project and class.

Document

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:
Flexible, Compliant Workflow

- Automate business processes

- Example Workflow: Standard Operating Procedure
  - FDA requirement for pharmaceutical, medical device, and biotechnology/biologics companies
  - SOP's must be approved before publication
  - Approved SOP's are reviewed regularly
  - Approved SOP's must be read by certain employees
Organizational Benefits

► Centralized document repository
  - Documents are available for everyone per user rights

► Robust search and discovery
  - Combination of powerful indexing and properties allow you to find what you need when you need it

► Improved security
  - Robust user and document access permissions

► Document history gets recorded automatically
  - Audit trails
Flexible Deployment

► Three deployment options: Cloud, On-premise, Hybrid
► One interface with identical behavior
► M-Files Cloud Vault
  ▪ Powered by Windows Azure
  ▪ No server to purchase or configure
  ▪ One affordable monthly fee
► On-premise
  ▪ Leverages existing investments

What's Different About M-Files?

► "Out of the box" ECM: Ease and Feature-Depth
► Usability and User Adoption (Deep Windows integration)
► Metadata-driven architecture
► Configurability and integration with external systems
► Unique vertical solutions: M-Files QMS, M-Files CLM
► Flexible deployment: cloud, on-premise, hybrid

First "native" Windows Azure-based ECM
M-Files Family

Additional Optional Modules:
- Scanning and OCR
- Reporting and Business Intelligence
- FDA Compliance

Targeted Solutions:
- M-Files QMS (Quality Management Systems)
- M-Files HR (Human Resources)
Reporting and Business Intelligence

- Provides insight and visibility into business operations
- Calculates and displays statistical data associated with vault contents
- Provides analytics for decision support
- Supported content from external sources such as data from CRM and ERP systems
Case Studies

AstraZeneca  
Life Sciences, Pharma, Biochemical

• M-Files is used to organize and track marketing collateral and make this information easily searchable for the Marketing Department.

tabula
Semiconductor Manufacturing

• “Our requirements were all typical features of digital document management, like version control, access permissions, workflow for file changes and approvals, archiving, and history logs…”

• “We needed something that new people can just jump into without any training.”
Case Studies

- Capgemini and GESTFORM developed its distributed Human Resources Management file system, called St@ff for customers wanting to outsource HR.

- GESTFORM built St@ff on M-Files technology.

- GESTFORM wanted a metadata driven document management system for St@ff.
Case Studies

MERISOL

Life Sciences, Pharmaceutical, Biochemical

• The Merisol Company is a joint venture between Merichem (Meri) and Sasol (sol) bringing together (Merisol) the technological expertise for the production of high quality cresylic acids with the world's biggest supplier of phenolic feed stocks.

• ISO 9001 Compliance
• Automated document approval processing (e.g. Invoice Processing)
• Centralized location for “global-anywhere” access
• Offline access for mobile users.
Case Studies

BSA LifeStructures

Architectural, Engineering and Design

- BSA LifeStructures needed a way to manage all its documents better than traditional Windows network folders -- without changing how architects and designers work.

- “That was the selling point -- the minimal user interface. It kept it simple for the employees. It didn’t change their workflow much at all.”

- Easy, yet powerful search capabilities creates a high user satisfaction rate.
More Case Studies

Public Sector: United Nations Environmental Programme

The following link is to a Web site created by the UNEP Stockholm Convention that is tightly integrated with M-Files such that the document listing and associated metadata is being published to the site directly from M-Files: Conference of the Parties Documents

Manufacturing: MicroPilot

Medical: Cardiology Associates

More M-Files Case Studies are available at http://www.m-files.com/stories
Powerful Search:
Find Documents Instantly

► Extremely efficient search results ranked by relevancy
  ▪ How recently was the document created
  ▪ How many times was a document edited or processed

► Search on file metadata and file contents

► Locate documents instantly even with millions of documents and TB of data
Dynamic Views

► Offer access to documents resembling traditional folder directories
  ▪ Easy to use

► Document properties (metadata) defines the views in which documents are listed
  ▪ One document can be found in several ways

► Views can be centrally managed

► Users can define their own views for each situation
M-Files Mobile Access

- Mobile Access on popular devices
  - Supports iPhone, iPad, Android, Windows Phone, and Symbia

- Intelligent synchronization for offline access
  - Automatic and fast updates
  - All necessary documents are always available
  - Fast even with slow Internet connections
  - Excellent tool for remote work
The Industry’s Most Advanced Permission Management

► User and user group rights can be defined easily for each document or class of documents

► 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

► Default options simplify setup and administration
Version History

» Version history is automatically documented

» Previous versions of documents remain available and they can be viewed any time
  ▪ Eliminates the risk of accidental data losses
  ▪ Traceability meets the requirements of quality standards and regulated industries

» Hard disk space efficient
  ▪ Only "delta" changes are stored
Document Modification & Collaboration

► Check-in and Check-out

► Before editing, a document is reserved for editing by checking it out
  ▪ Prevents the risk of several users editing the document at the same time, and one overwriting the changes of another

► Other users are able to read documents that are checked out

► Documents are checked-in after editing, making them available for further editing by others
Notifications and Assignments
Quality Management and Compliance

► Supports compliance initiatives
  ▪ FDA 21 CFR Part 11
  ▪ EU GMP Annex 11
  ▪ ISO 9000/9001
  ▪ Good Manufacturing Practice (GMP)

► Target industries
  ▪ Pharmaceutical and life sciences, healthcare,
Web Access

- Browser-based user interface
  - Access for external parties such as customers, subcontractors or public Internet users
  - Location and platform-independent (e.g., Mac, Linux)
Paper Documents

• Paper documents can be captured with existing scanners and Multi-Function Devices
• Support for all scanners with TWAIN and WIA interfaces
• Document classification may be automated
  ➜ e.g. document type, document circulation
• Scanned documents can be found based on document contents with integrated OCR

Paper Documents → Local or Network Scan → M-Files Character Recognition → Document in M-Files

(OCR)
Microsoft Dynamics Integration
Administration

- Document vault structure is easy to manage and edit
  - Users and user groups
  - Document classification structure
  - External data
  - Workflows
  - Backups
  - Archiving
  - Event log