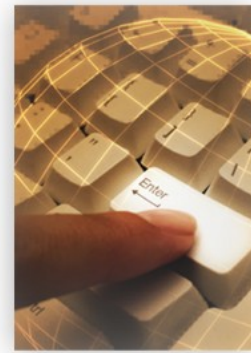




M-Files Corporation
January 23, 2013

*METADATA-POWERED INFORMATION
MANAGEMENT*



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



served:

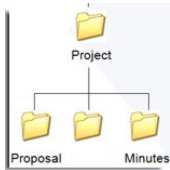
Accounting & Financial, AEC, Education,

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

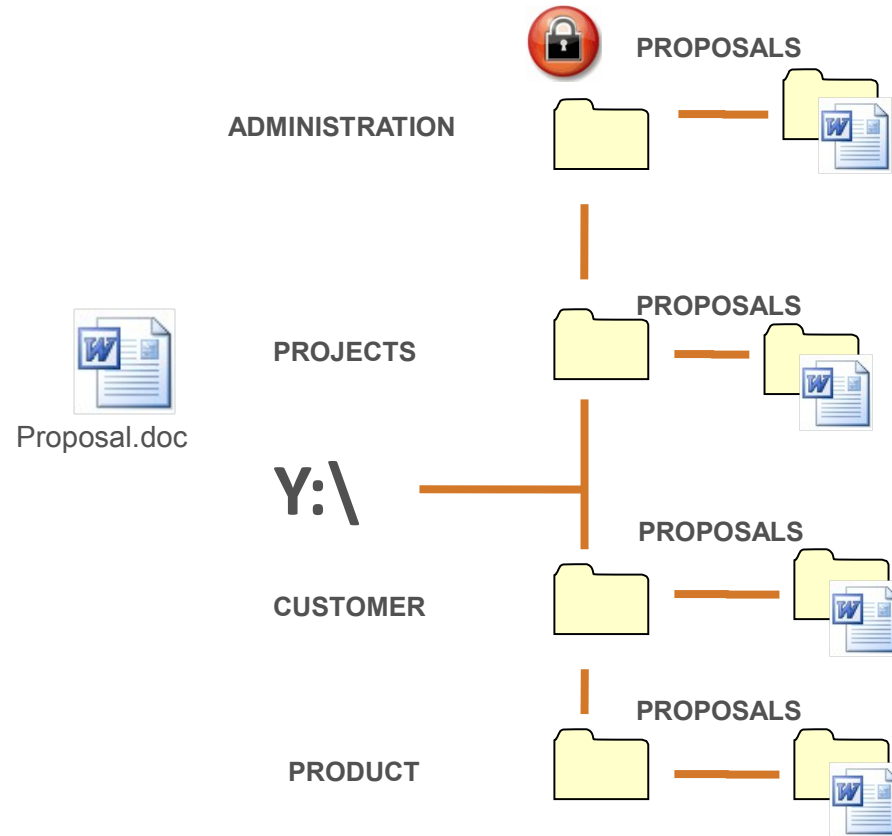
Databases

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?



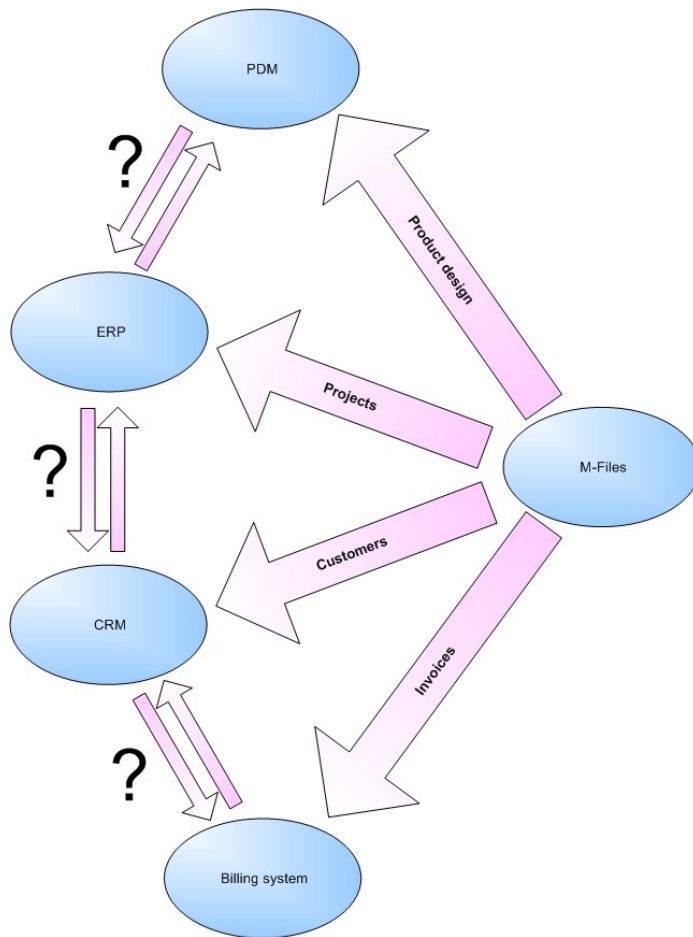
PROBLEMS WITH FOLDER STRUCTURES

- ➡ 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.)

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

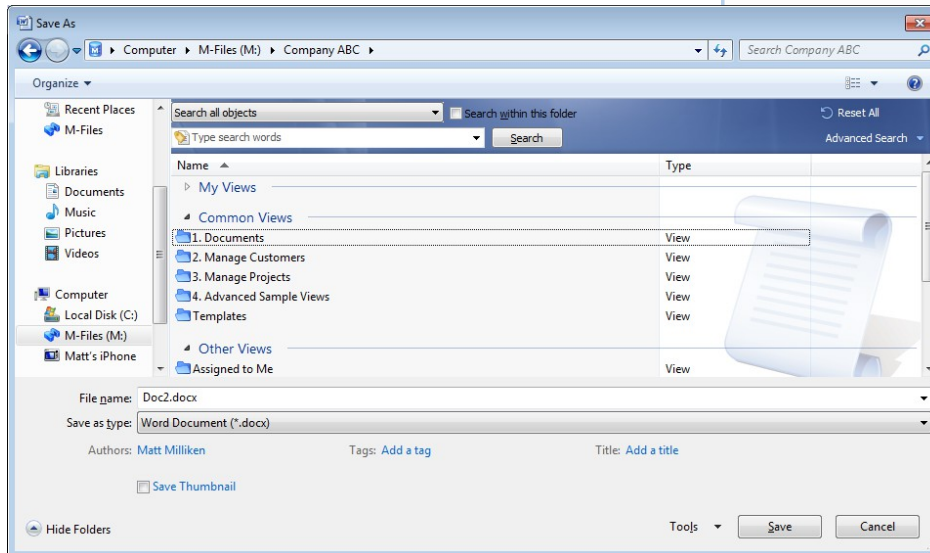
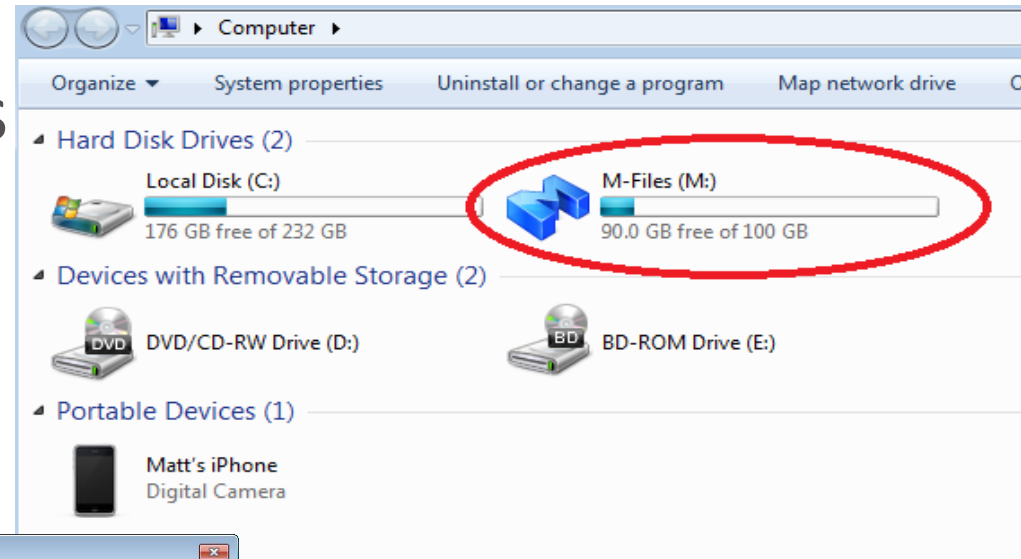
► M-Files integrates easily with existing business systems

- 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:

1. Document type
2. Date
3. Customer
4. Project

3. Benefits

(for organization and user)

for example:

1. Immediate finding
2. Automatic versioning
3. Offline availability
4. Document re-use



Dynamic Views



- By Project
 - Austin District Redevelopment
 - Proposal - Web Site Graphics for ESTT
 - Project Announcement / Austin.pdf
 - Project Meeting Minutes 3/2006.doc
 - Hospital Expansion (Miami, FL)
 - Initial Land Survey / Central Plains

Documents sorted by projects.



- By Customer
 - A&A Consulting (AEC)
 - Door Chart 51E
 - Floor Plans of the Additional Building
 - Proposal - Web Site Graphics for ESTT
 - CBH International
 - City of Chicago (Planning and Development)

Documents sorted by customers.



- By Project and Class
 - Austin District Redevelopment
 - Agreement
 - Price List
 - Proposal
 - Proposal - Web Site Graphics for ESTT
 - Proposal 7705 - A&A Consulting (AEC).doc

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:

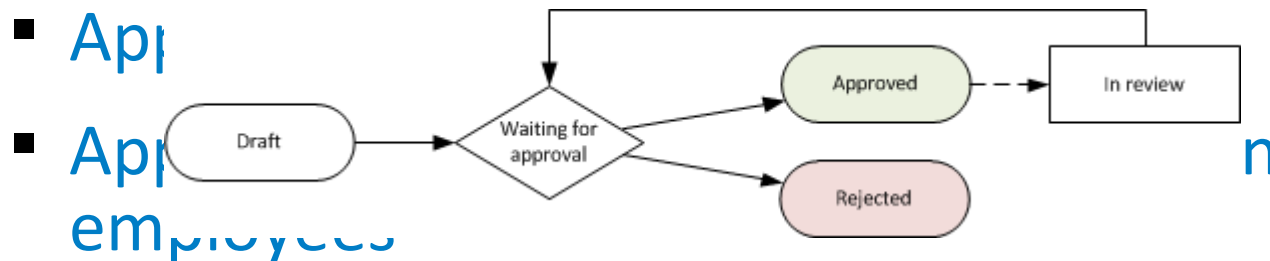
Proposal number: 7742

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



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 look and feel
- ▶ 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

M-Files Family

Additional Optional Modules:

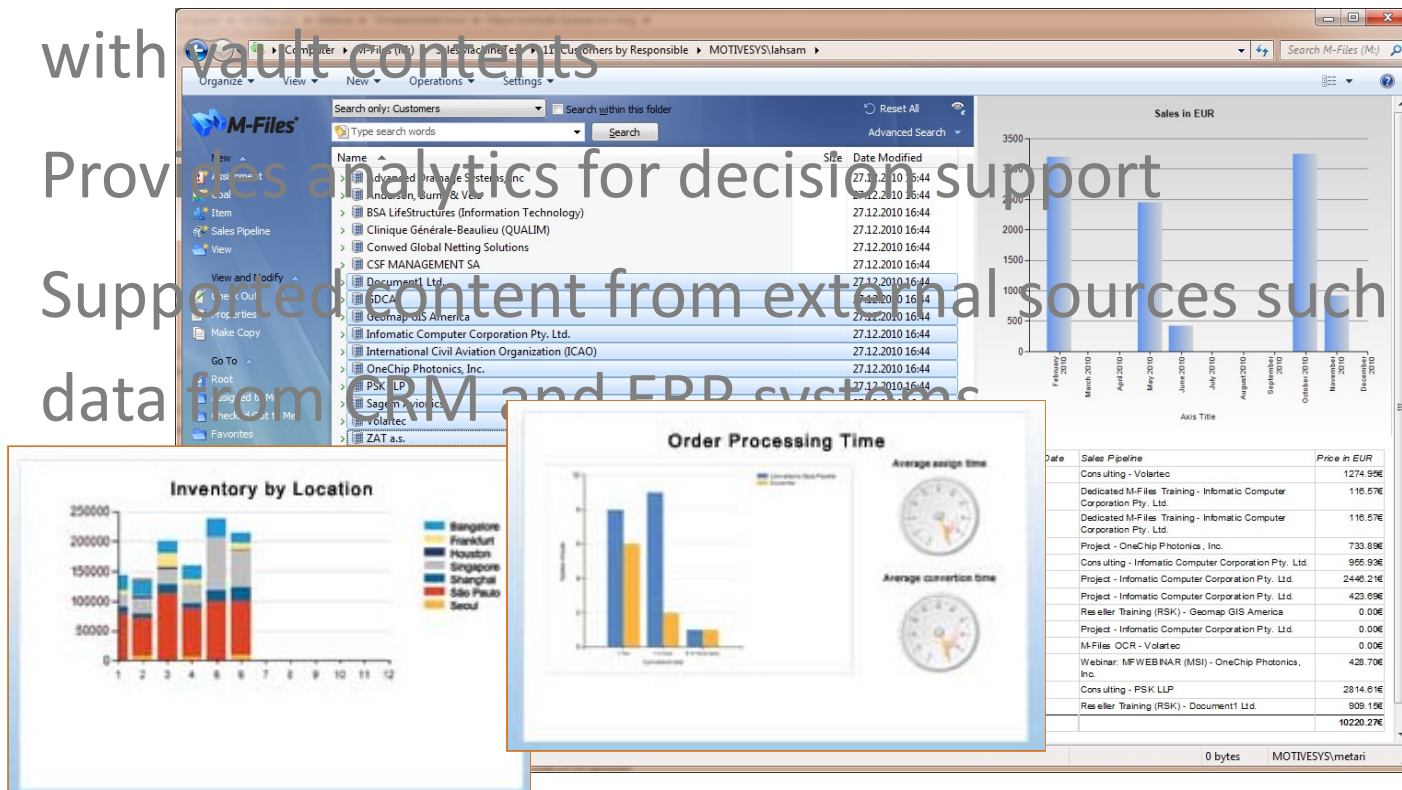
- Scanning and OCR
- Reporting and Business Intelligence
- FDA Compliance

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



Life Sciences, Pharma, Biochemical

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



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



HR and Business Consulting

- 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



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



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

http://www.m-files.com/eng/res/successstories/UNEP_M-Files.pdf

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

http://www.m-files.com/eng/res/successstories/MicroPilot_Mfiles.pdf

Medical: Cardiology Associates

http://www.m-files.com/eng/res/successstories/Cardiology_Associates_M-Files.pdf

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

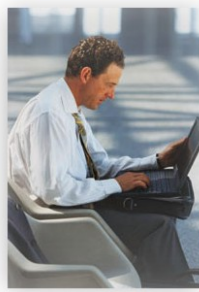
- ▶ Offer access to documents resembling traditional folder directories
 - Easy to use
- ▶ Document properties (metadata) defines the views in which documents are listed
 - One document can be found in several ways
- ▶ Views can be centrally managed
- ▶ Users can define their own views for each situation



Traditional Folders:

Files only have one location.

Multiple copies of files may be in different locations.



M-Files Mobile Access

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



- ▶ Instant synchronization for on-the-go access
 - Automatic and fast updates
 - All necessary documents are always available



- Fast even with slow Internet connections
 - Excellent tool for remote work



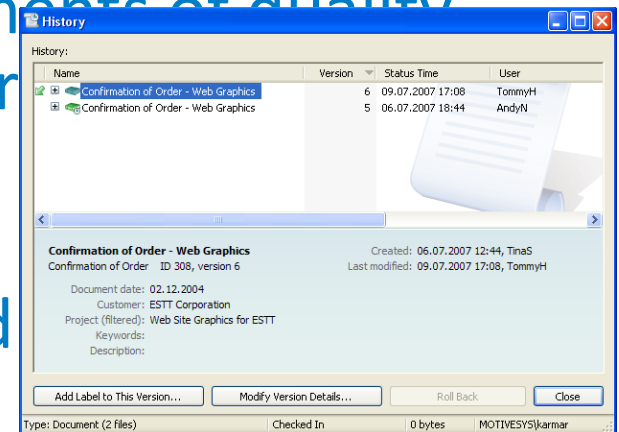
The Industry's Most Advanced Permission Management

- ▶ 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



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

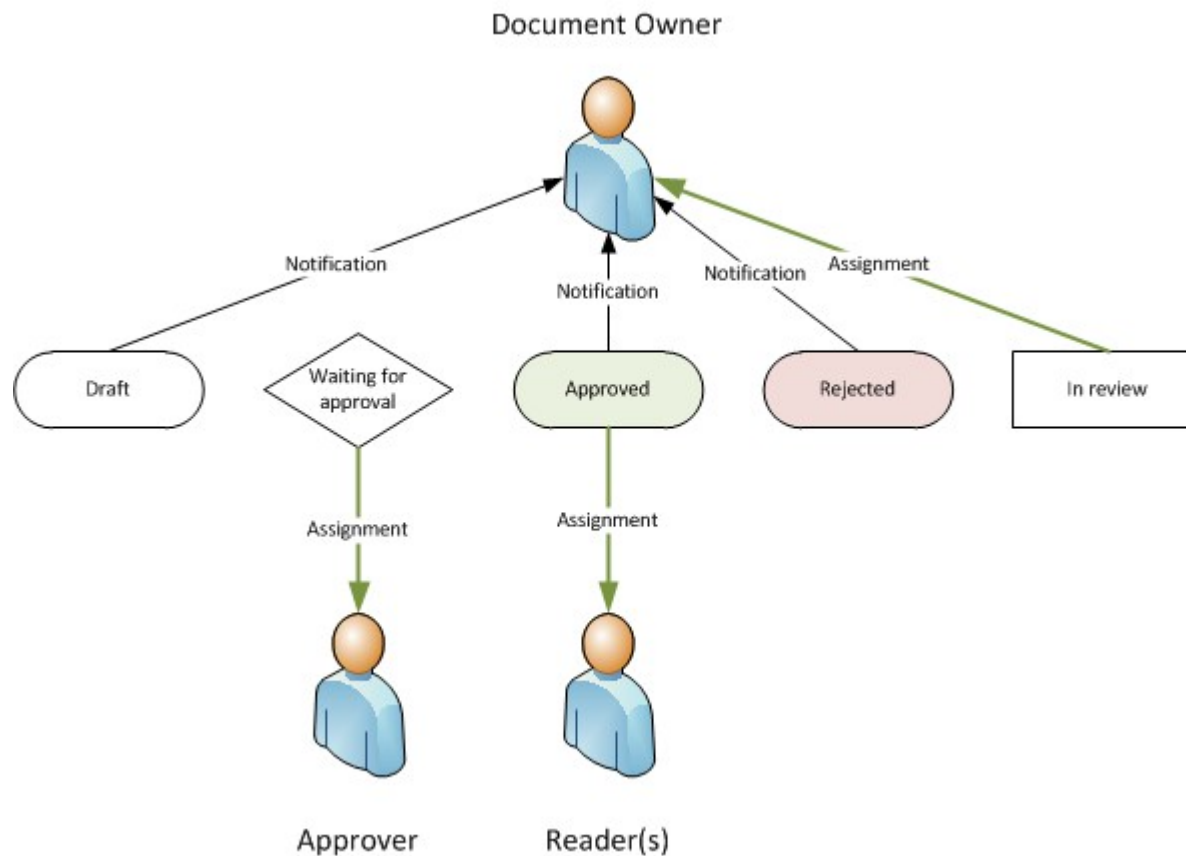




Document Modification & Collaboration

- ▶ 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

Notifications and Assignments



[illegible]

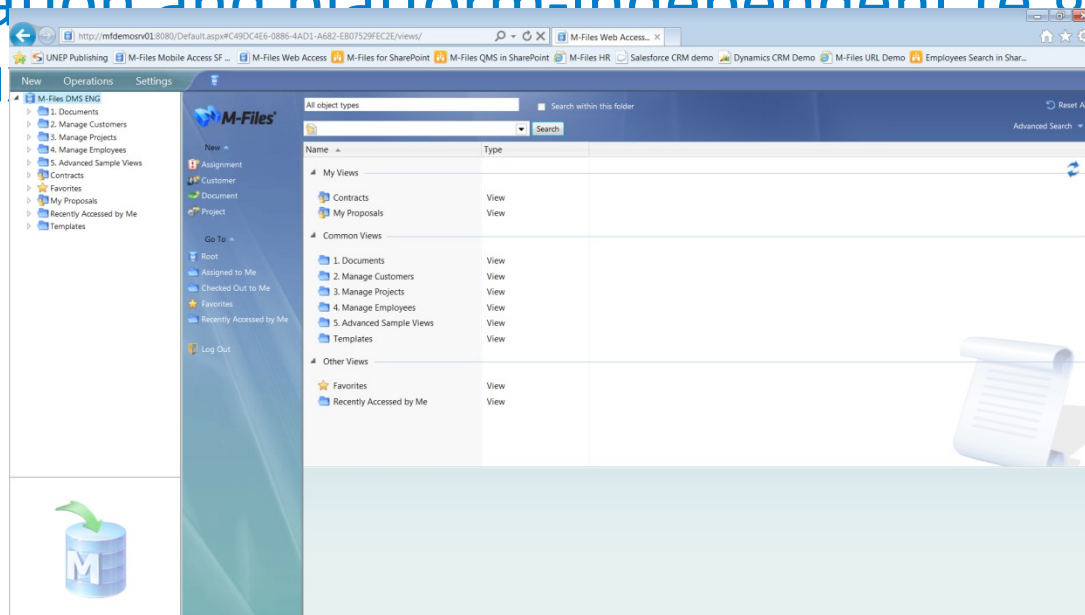
- # METADATA-POWERED INFORMATION MANAGEMENT



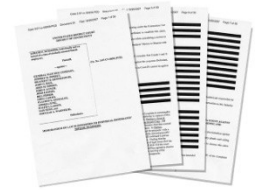
Web Access

► 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

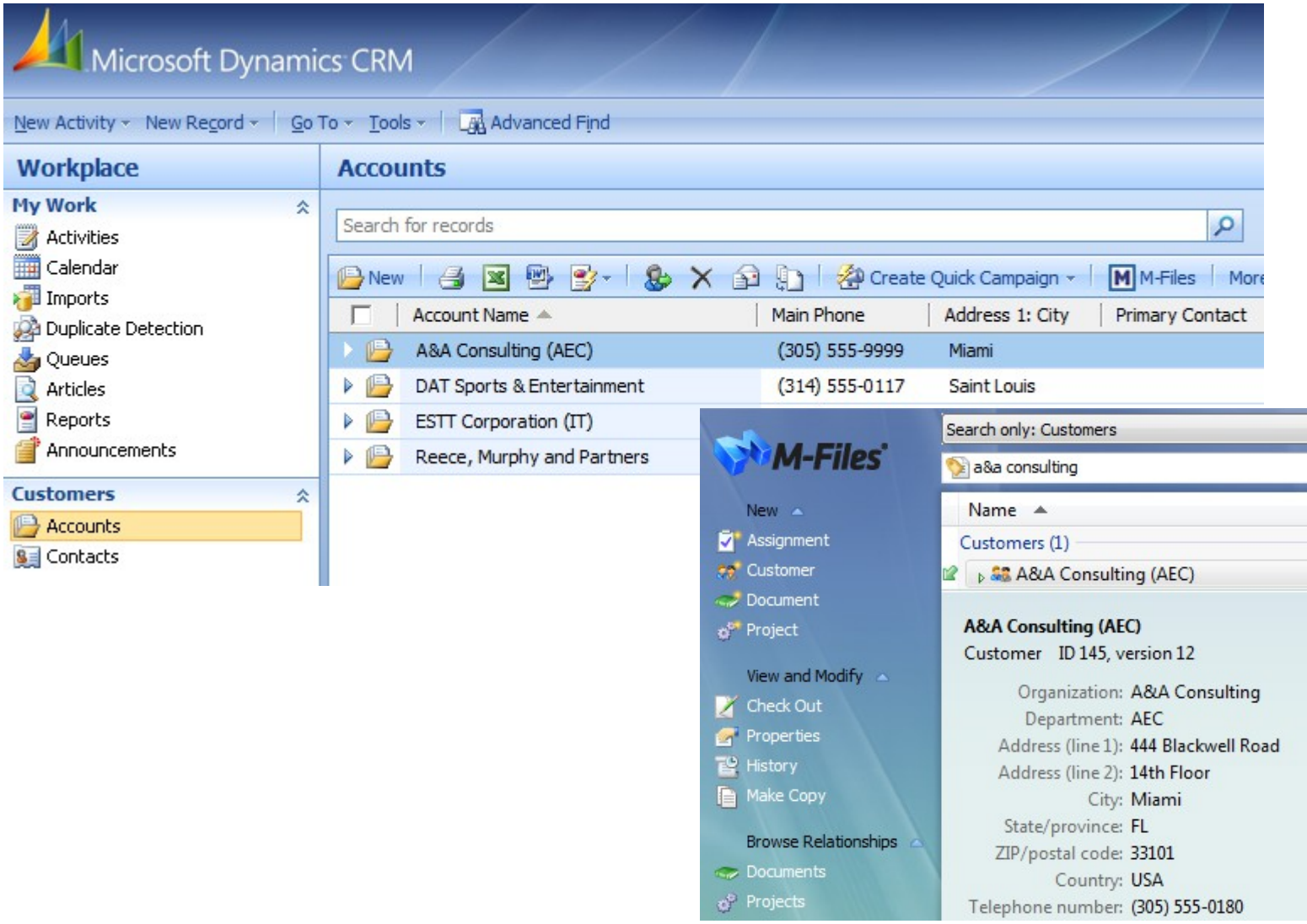
Local or Network Scan

M-Files Character Recognition


Document in M-Files

(OCR)

Microsoft Dynamics Integration



Microsoft Dynamics CRM

New Activity ▾ New Record ▾ | Go To ▾ Tools ▾ |  Advanced Find

Workplace

My Work











- Activities
- Calendar
- Imports
- Duplicate Detection
- Queues
- Articles
- Reports
- Announcements

Customers


- Accounts
- Contacts

Accounts

Search for records

 New |
  |
  |
  |
  |
  |
  |
  |
  Create Quick Campaign ▾ |
  M-Files | More

Account Name	Main Phone	Address 1: City	Primary Contact
A&A Consulting (AEC)	(305) 555-9999	Miami	
DAT Sports & Entertainment	(314) 555-0117	Saint Louis	
ESTT Corporation (IT)			
Reece, Murphy and Partners			

 **M-Files**

New ▴

- Assignment
- Customer
- Document
- Project

View and Modify ▴

- Check Out
- Properties
- History
- Make Copy

Browse Relationships ▴


- Documents
- Projects

Search only: Customers

a&a consulting

Name ▴

Customers (1)

 A&A Consulting (AEC)

A&A Consulting (AEC)
Customer ID 145, version 12

Organization: A&A Consulting
Department: AEC
Address (line 1): 444 Blackwell Road
Address (line 2): 14th Floor
City: Miami
State/province: FL
ZIP/postal code: 33101
Country: USA
Telephone number: (305) 555-0180



Administration

► Document vault structure is easy to manage and edit

- Users and user groups
- Document classification structure
- External data
- Workflows
- Backups
- Archiving
- Event log

