



Metadata Structure Overview

What is Metadata?

- ▶ Data about data, i.e., descriptive data related to the context:
 - **document metadata**
 - class (document type)
 - document date
 - customer related
 - project related
 - **customer metadata**
 - contact information

Metadata in M-Files

- ▶ All saved objects in M-Files are described with metadata (object properties):
 - To which customer is a proposal is related?
 - How long is a document valid?
 - In which city is a customer's headquarters located?
- ▶ In traditional Document Management Systems, metadata cannot be added to documents.

The importance of well defined Metadata Structure in M-Files

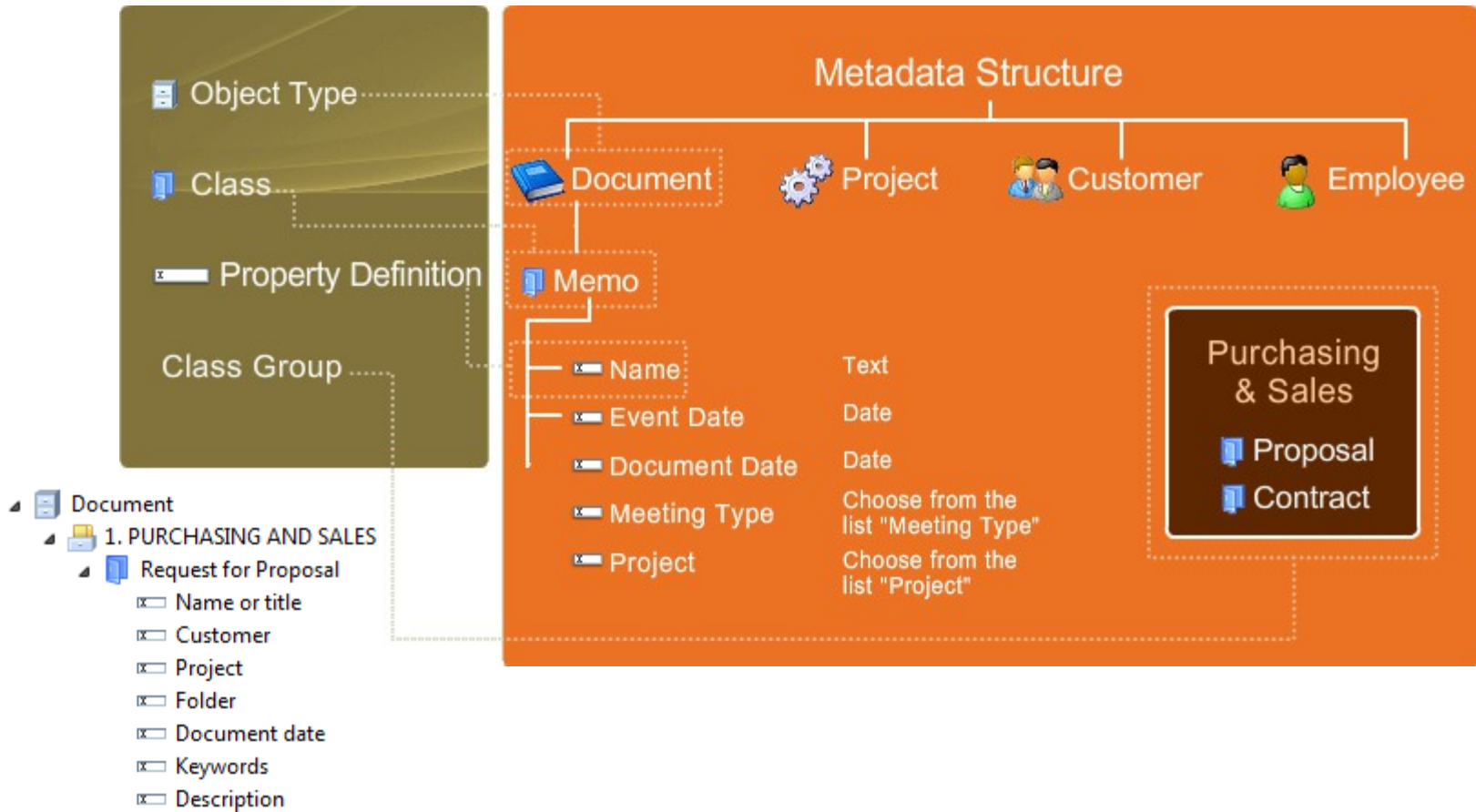
- ▶ **Well defined metadata structure** is a key success point when implementing M-Files
- ▶ Metadata structure must serve **the needs of the organization**, not vice versa
- ▶ It is recommended to define the structure in cooperation with M-Files Corp.
- ▶ Views are defined based on metadata
 - You can find a document with search phrase *Customer X*, but it will not be listed in view

Metadata Structure Terminology

- ▶ Document vault
- ▶ Object type
 - Document, Customer, Employee, Project
- ▶ Class group
 - Sales, Meetings, Production
- ▶ Class
 - Agreement, Report, Memo, Agenda
- ▶ Property



Metadata Structure Hierarchy



Object Type

- ▶ The top level concept in metadata structure
 - Document, Customer, Project
- ▶ Object types other than document or document collection can be considered as data registries within the system
 - If you want to create a registry of your employees, create a new object type *Employee*



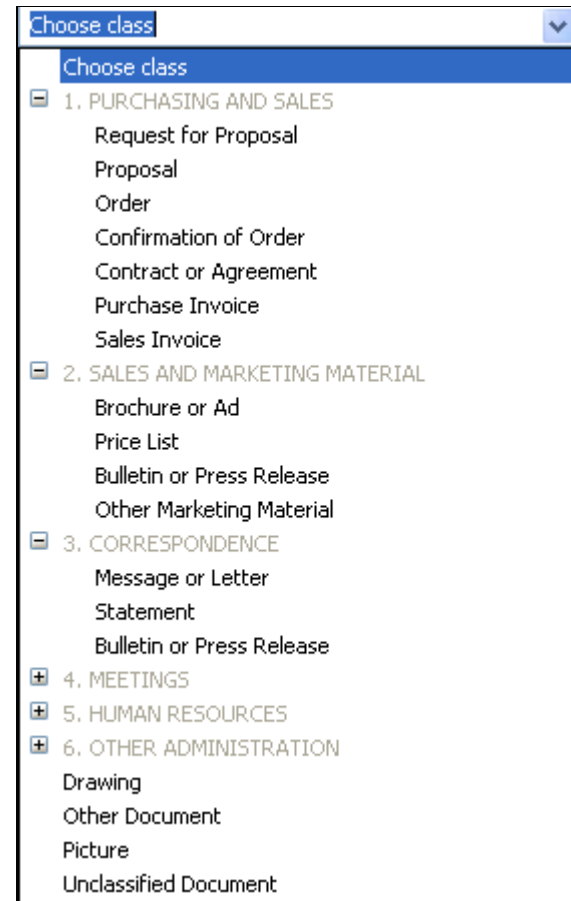
Class

- ▶ Classes are used to classify object types into smaller entities
- ▶ In the Document object type, class answers the question: "***What is this document?***"
- ▶ Examples of class names
 - Proposal (Quotation)
 - Agreement
 - Report



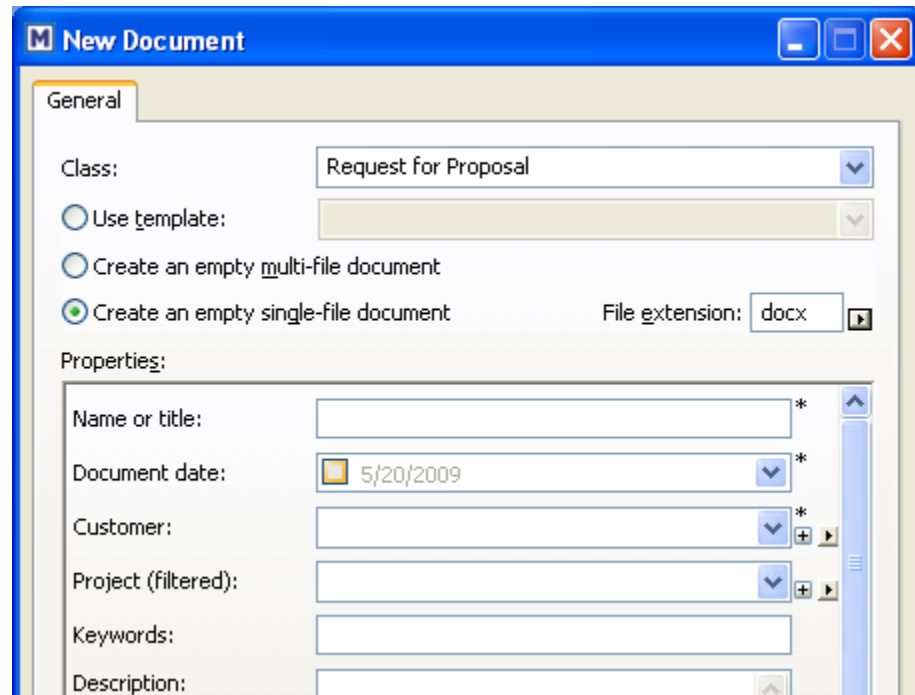
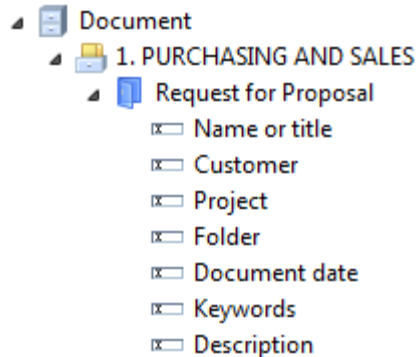
Class Group

- ▶ Class Groups do not have any effect on metadata structure
 - Class groups are used to ease class management by gathering similar classes together



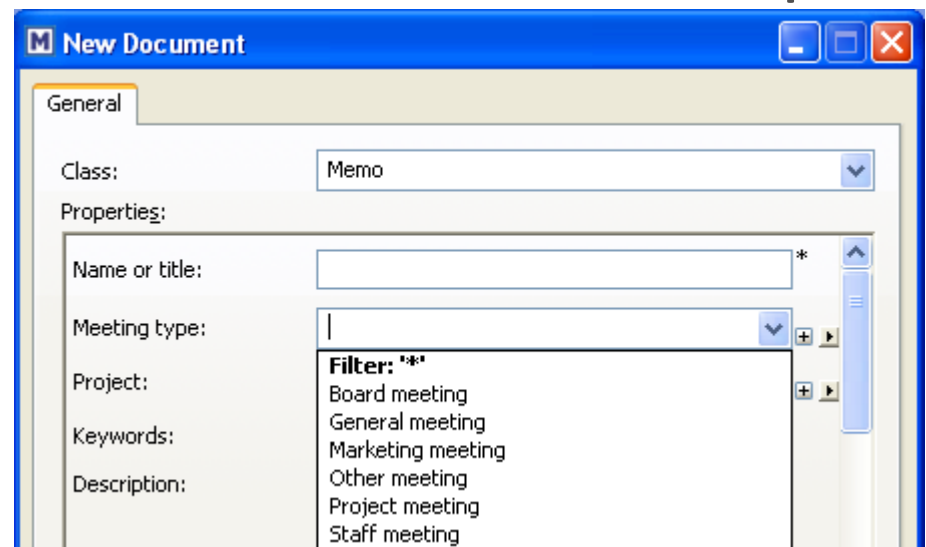
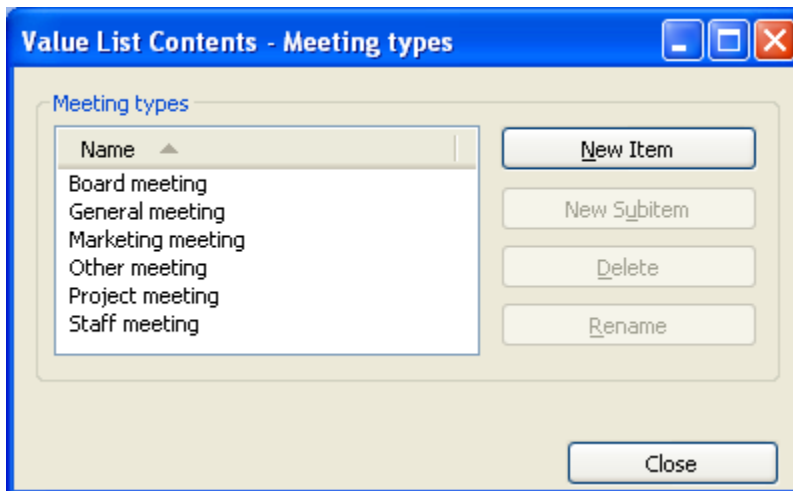
Properties

- ▶ Properties are class-specific and determine the properties shown on the metadata card when adding or modifying objects within M-Files



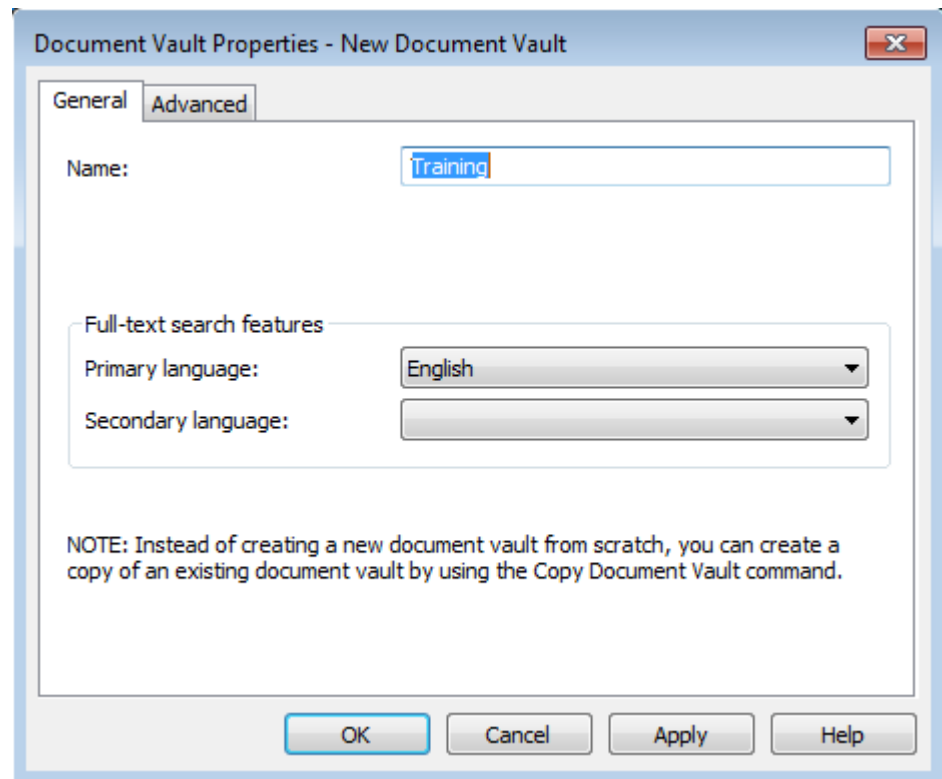
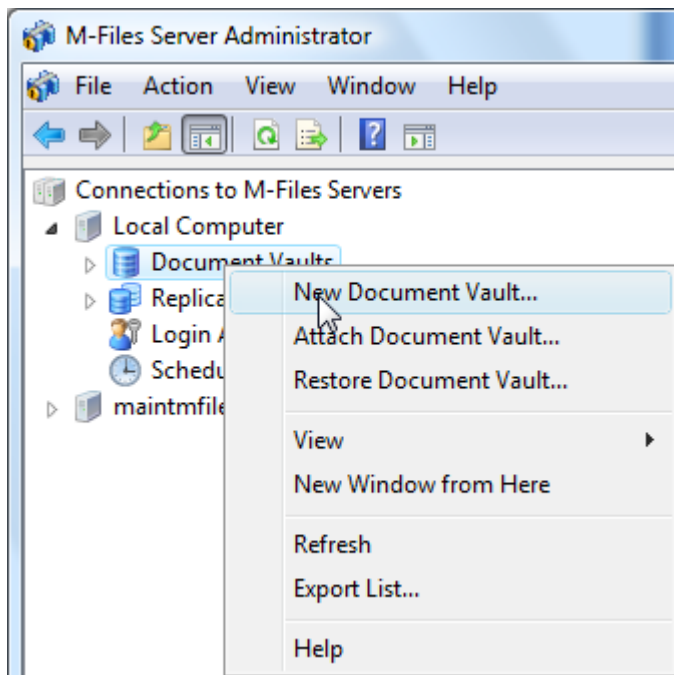
Value list

- ▶ Value lists are used with *Choose from list* and *Choose from list (multiselect)* type of properties
- ▶ Value list determines the content of the drop-



Exercise 1

Create a new document vault *Training*



Exercise 2

Add Document Vault Connection to the *Training* vault

