



Automated Processes Application Modules















A LIBRARY TO MAXIMIZE USE OF M-FILES

The **Automated Processes Application Module Library** will help get you to the finish line faster as you work to maximize use of the M-Files Solution throughout your organization. The package is built on the Vault Application Framework, which is native to M-Files.

This framework was created by M-Files engineers to provide a better way to develop and maintain complicated M-Files custom solutions, which previously used scripts and could result in significant maintenance. It provides a mechanism to use a more universal programming language that can be debugged, provide logging, and unit tested. The applications are run server-side which keeps deployment simple and changes easily managed. This results in the development of exceptionally reliable applications.

For a nominal fee you not only receive access to the complete library of applications already developed, but these will also continue to be developed. The modules are also covered under our standard support and maintenance programs.

Current Module Library

 Approval Matrix	 Duplicate Detection	 MailSorter	 Match Maker
 Missing Required Documents	 Object Generator	 Property Calculator	 Retention
 Send Mail	 Workflow State Timespan Calculator	 Scheduled Object Creator	 Re-Importer

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DETAILS ON CURRENT MODULE LIBRARY



Approval Matrix

This module allows you to set up an approval matrix based on a dollar amount. It helps to deliver complex workflow approval rules. One use case example; Accounts Payable invoice approval routing based on the amount of the invoice.



Duplicate Detection

This module detects duplicated content based on the metadata added to the document. The module then links duplicate items together based on the rules configured. Once linked, users can review the items to determine the next steps needed.



MailSorter

MailSorter reclassifies email attachments imported from external email sources as multi-file documents. M-Files imports email attachments into M-Files by default as multifile objects. Mail Sorter processes the attachments by exporting them out of M-Files and preparing them to be picked up from a M-Files watch folder. When the attachment is placed in the watch folder, a XML file is created for each attachment file and be used to classify the document when imported.



Match Maker

The core function of this module is to programmatically match data together. You can define which items to match that will link the objects together in M-Files. One example of where this module can be of immense value is for Account Payable processes. Automatically matching invoices to the check and/or the purchase order provides a 360-degree view of the transaction. This module can also copy properties from one object to another. This may be required for the greatest visibility of the item in a particular process.



Missing Required Documents

When you use this module, you simply set which type of documents are necessary for a required business need. The module identifies what is missing from the referenced object.



Object Generator

The core function of this module is to automatically create objects that can be related to the Source object. It can also be used to create specific templated documents related to referenced object data. One use case example of where this application is used frequently is to help facilitate New Hire onboarding requirements. There are various required steps and documentation needed when hiring an employee. Use this module to define the requirements for the end-user responsible for your new hire processes.

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Property Calculator

Many processes require various data to be calculated. Based on the calculated values, it can help to carry out rule-based logic. This module can do the heavy lifting for you by performing the calculations on your behalf. Want to deny the approval of an invoice if the total is more than the approved Purchase Order? This module is the perfect way to leverage a solution to do the work.



Retention

This module provides the framework to deploy retention policies of data that resides in M-Files. It allows for the auto calculation of properties that define archive or destroy dates to then carry out scheduled replication processes on. You can set rules and systemically generate dates to trigger an action.



Send Mail

This module allows for an individual or a group of documents which have the same object association, like "Project", to be gathered & emailed as a single PDF. Once configured, the target document(s) in M-Files are collected & sent using Exchange Online (requires an Exchange mailbox). You have the flexibility to define the subject, email message, and name of the attachment file.



Workflow State Timespan Calculator

This module calculates time between workflow states in hours, which allows your organization visibility of where bottlenecks in the process may exist.



Scheduled Object Creator

The core function of this module is to automate the creation of new objects. This is accomplished through M-Files workflow triggers and auto transitions. You have full control over the timing of this event, and it is also repeatable.



Re-Importer

This module allows for automated updating of documents that already reside in M-Files. The module places a QR code on the document when it is initially saved into M-Files. This document then can be distributed and completed as required. Once it is received back M-Files collection processes will update the existing document in your vault.

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