



M-Files User Group Webinar

December 14, 2022





Today's Panelists

- **Kurt Meemken**, Director of Software Solutions
- **Tracy Kollmann**, Software Solutions Manager



Today's Agenda

- M-Files Vault Application Framework
- Marco's Custom Developed Application Module Package Overview
- M-Files Release Updates & User Training



What is the Vault Application Framework (VAF)

- It was created within M-Files to provide a better way to develop and maintain complicated M-Files scripts which, previously, required significant overhead.
- A mechanism to use C# (.NET) code instead of VBScript within a M-Files Vault.
- The VAFs run server-side.



The benefits of VAF's

- What can be done with VAF
 - Event Handlers
 - Property Values
 - Workflow Elements
 - Vault Extension Methods
 - Background Operations
- Can be configured to run simultaneously
- Provides logging and it can be debugged
- Unit Testing is possible



Marco's Automated Processes Application Module





Overview

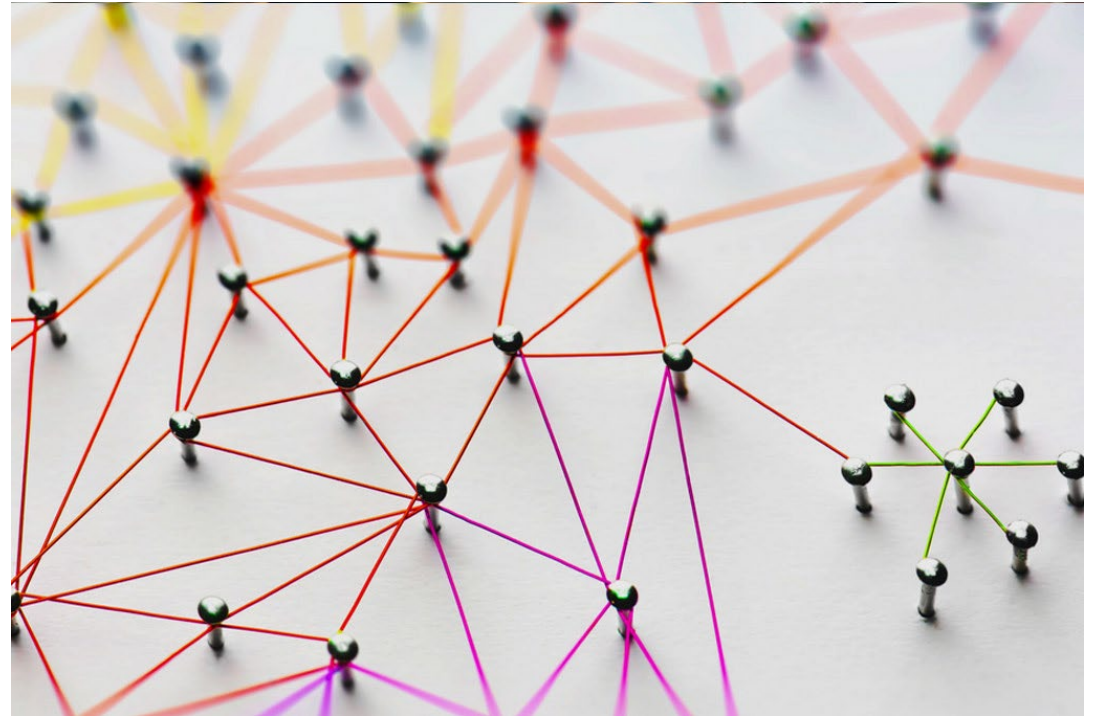
- Officially released Fall 2022
- Available to M-Files subscription customers
- Gain access to the entire library of VAF's that are already developed and continue to be developed
- Pricing available upon request





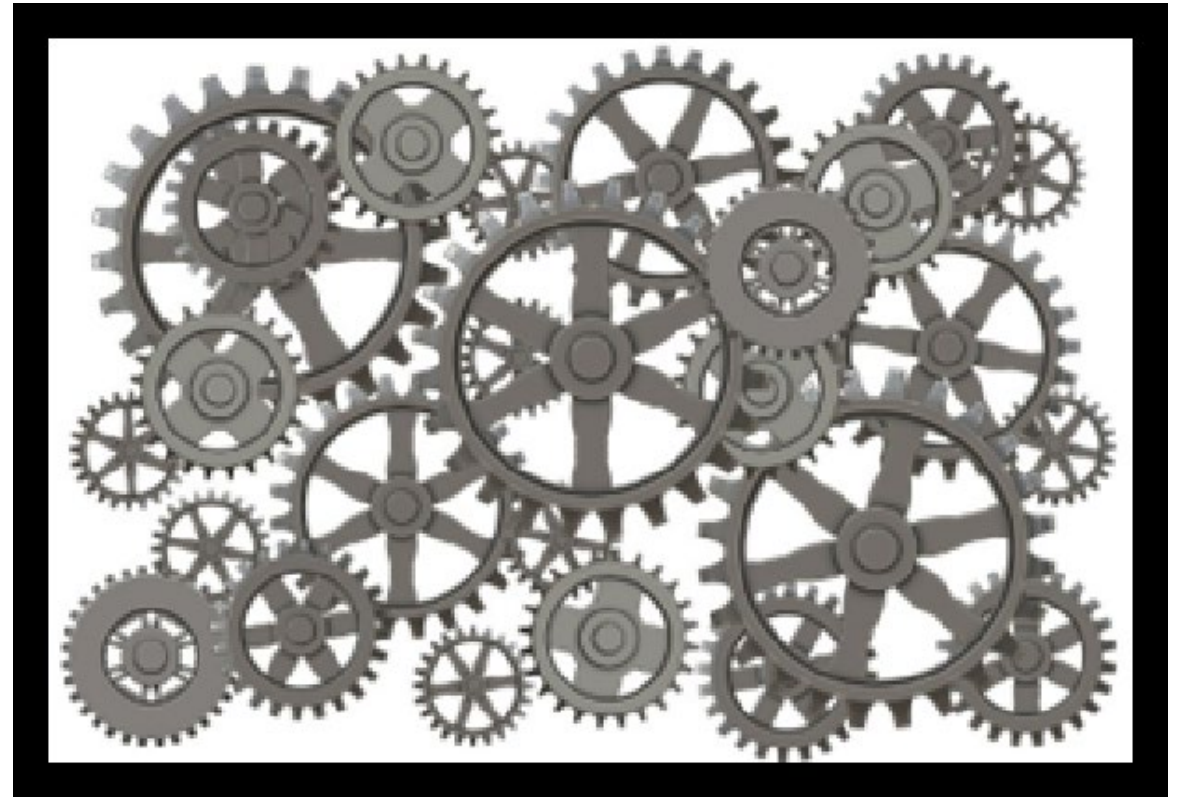
Match Maker

- Match Items Together
- Control which Items to Match
- Link The Items Together
- **Use case example:** Match invoice to check programmatically



Object Generator

- Automatically creates objects which can be related to the Source object
- Can also be used to automatically create templated documents
- **Use case example:** Can help facilitate New Hire onboarding requirements





Property Calculator


- Automatically calculate values of defined property values
- Based on the calculated values, carry out rule-based logic
- Compare values of the indexed data
- Return a Value
- Copy Properties from one to another
- **Use case example:** Does PO amount match invoiced amount





Approval Matrix

- Allows you to set up an approval matrix based on a dollar amount
- Helps deliver complex workflow approval rules
- **Use case example:** AP invoice approval routing based on amount of invoice

If Amount Is	Billable Time?	Route To
	Yes	Accounts Payable 
>\$50 USD		Manager 
>\$500 USD		Director 
>\$2000 USD		VP 



Retention

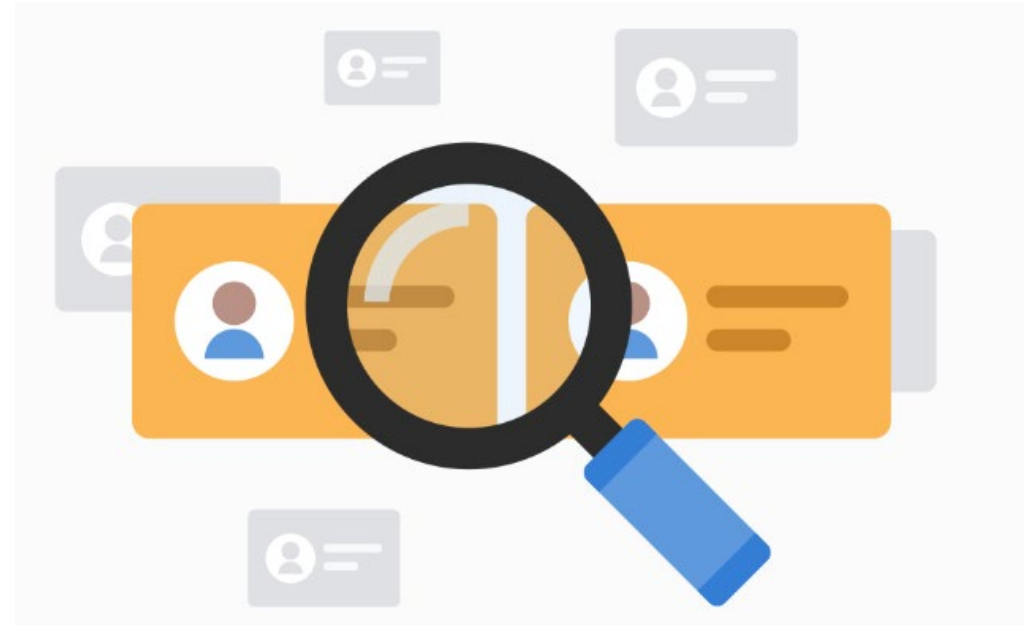
- Provides the framework to deploy retention policies of data added to M-Files
- Allows auto calculation of properties that define archive/destroy dates to then carry out replication processes
 - Set rules and system generate dates to act upon
 - Archive/Destroy Data via the replication tool





Duplicate Detection

- Identifies duplicates of documents based on metadata content
- Links duplicate items together so further review can take place





Workflow State Timespan Calculator

- Calculates time between workflow states in hours
- Great to bring visibility of where bottlenecks may exist

A photograph of a computer monitor displaying Java code in a dark-themed editor. The code defines a utility class for parsing location strings. A desk lamp is visible on the right side of the frame, casting light on the screen.

```
package com.ds.wof.be.secure.refr;
import ...

public final class LocationUtils {

    /**
     * Parses Point from IT's String representation.
     * @param locationString - String that represents location, as 2 double values split with comma. Accepts space after/before.
     * @return org.springframework.data.solr.core.geo.Point instance
     */
    public static Point parseLocationString(locationString) {
        Preconditions.checkNotNull(locationString, "Location String should not be null");
        Preconditions.checkArgument(locationString.contains(","), "Location must be split with comma");
        locationString = locationString.trim();

        if (locationString.contains(" ")) {
            locationString = locationString.replaceAll(" ", "");
        }

        if (locationString.contains(",")) {
            locationString = locationString.replaceAll(" ", "");
        }

        String[] location = locationString.split(",");
        Preconditions.checkArgument(location.length == 2, "Location should consist of at least 2 Double parameters");
        double lat = Double.parseDouble(location[0]);
        double lon = Double.parseDouble(location[1]);

        return new Point(lat, lon);
    }
}
```

Missing Required Documents

- Define required documents
- Application will help identify what documents are missing from a referenced object.



M-Files Releases

800.847.3098 | [MARCONET.COM](https://marconet.com)



Simple.
Secure.
Better.

October 2022

Rollout with automatic updates began on October 19th, 2022 (22.10.11903.5)

- Indexing done from latest to oldest object leading to more accurate search
- Set M-Files Web as the default Web client instead of Web Classic
- Create copies of NACLs in M-Files Admin
- Add properties to all classes of an Object Type or Class Group
- Authentication with Open ID Connect or OAuth 2.0 to support access tokens in Web

November 2022

Rollout of clients with automatic updates began on November 28th, 2022 (22.11.12033.9)

- Desktop UX Refresh
- Smart Migration Improvements
- Relevance ranking configuration for Smart Search

Desktop Refresh – November 2022

- November’s release now provides you the ability to open a new window to see the **metadata** and **preview** at the same time.
- You can also pop up the metadata card with **ALT + ENTER**
- In **M-Files admin** setting the **“Allow Single Metadata Card Pop Only”** to yes will allow users to dynamically click through items in their view of focus.

The screenshot displays the M-Files desktop environment. At the top, a file list shows three items: 'Doe, John.docx' (27 KB, 11/29/2022 2:35...), 'Invoice 003.pdf' (83 KB, 11/29/2022 2:34...), and '2018 Marketing Plan.docx' (12 KB, 11/29/2022 2:29...). Below the list, a metadata card for 'Doe, John.docx' is visible, showing document ID 921, version 6, and creation/modification dates. To the right, a preview window for 'Invoice 003' is open, displaying document ID 922, version 1, and creation/modification dates. The main content area shows a metadata card for 'John Doe' with fields for Class (Application), Full Name, First Name, Last Name, Phone Number, Department, and Assignment description. The preview window shows a letter from Dave to John Doe regarding a Software Solutions Support Technician position at Marco.



Enabling Dynamic Document Selection for Indexing Processes

A short description of the functionality:

- Once pop-up is first opened, it is updated when a new object is selected.
- Saving changes in the pop-up will not close the pop-up.
- Discarding changes in the popup will close the pop-up. Changes can be discarded simply by selecting a new object.
- Pop-up can be closed by upper right corner window close (X). Possible unsaved changes are then automatically discarded. This works the same way as in the regular pop-up.
- Pop-up is list/search specific: when e.g. a new search is performed, the popup will be automatically closed. Then a new pop-up needs to be opened for items in a new search results list.
- If selecting an object that has no metadata - e.g. a view, the popup is not updated (shows the previously shown object). Once a new object is selected, popup is updated again.
- You can use file content preview from the metadata card by clicking the arrow icon on top right.
 - This is disabled by default, and can be enabled with the following steps in M-Files Admin, go to the Advanced Vault Settings section:**
 1. Configuration → Client → Manage client settings centrally → Yes, accept warning about potential trouble this can cause.
 2. Configuration → Client → Desktop → Metadata card → Allow Single Metadata Card Popup Only → Yes
 3. Save settings

Users need to log-out/login to see the changes.



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