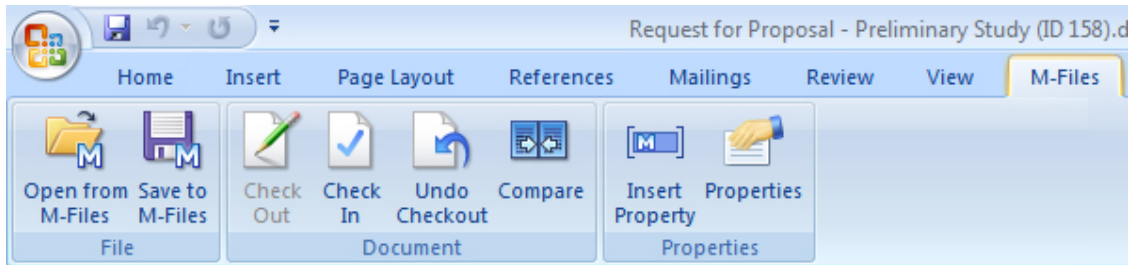


## **New Features and Enhancements in M-Files 5.0**

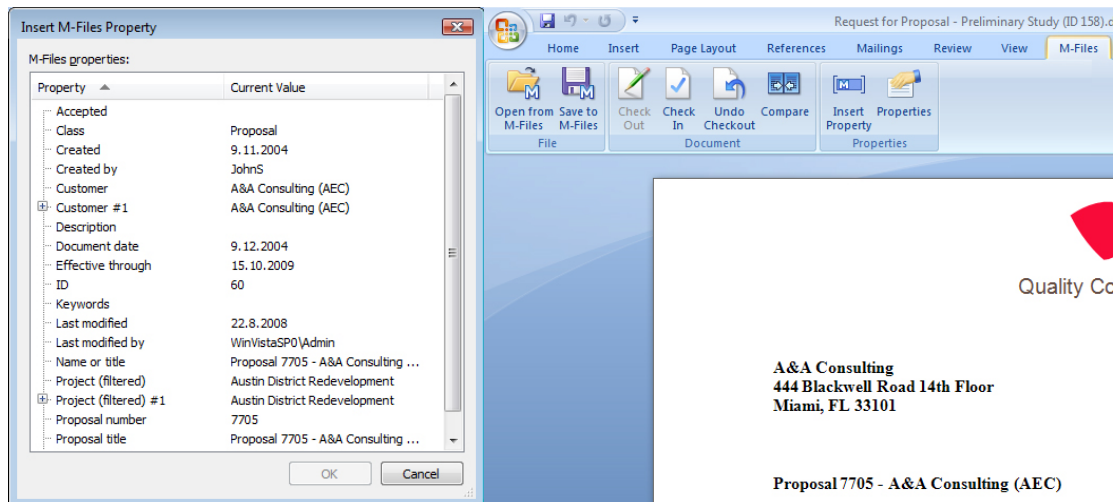
## 1. M-Files functions in Microsoft Office and AutoCAD

The new functions offered by M-Files speed up document handling and increase the possibilities for using M-Files in many different applications: Documents can be opened from and stored in M-Files directly. The contents of different document versions can be compared with each other, and any changes between the different versions can easily be displayed. Document metadata can be edited directly in Microsoft Word, Microsoft Excel, and AutoCAD, and the changes are automatically saved in M-Files. E-mail messages and attachments can be stored directly in M-Files in various file formats.



All M-Files functions are available through the M-Files menu.

- Document metadata stored in M-Files can be included in document contents by using the *Insert Property* function. You can set up text fields or cells in Word and Excel in which the selected *M-Files properties* are filled in automatically. For example, you might insert the name of your proposal document as the heading of the cover letter. The *Insert Property* function can be used to conveniently create document templates.
- M-Files functions can also be found integrated into the AutoCAD and AutoCAD LT software.



Insert any M-Files properties you want into the document with the *Insert Property* function.

## 2. Automatic property values for documents and other objects

- An *automatic value* can be set for a property. This means that, for example, invoices can be *consecutively numbered*. An automatic value can also *contain text*, in which case it is a combination of other properties.
- Automatic values increased utilization of document and object metadata in storing and searching for information. In addition, using automatic values reduces the need for repeated data entries. Automatic values are especially useful for naming objects and in automatically including metadata in document content.

### 3. Automatic naming of documents or other objects

- Naming a document or an object according to a selected property: Any property of the class can be *set as the name of the object*; that is, the property is selected as the *name property* for the objects of this class. Then the name of the object does not have to be entered separately; instead, a certain property can be set up to always be the name or “title” of the object in the class in question. This makes the naming of objects in a class more consistent.
- The automatic value of the property may at the same time be the name of the proposal document, so the name can be formed automatically in accordance with the class, product, or customer name (*Proposal/Mach20A/ESTT*).

### 4. Expanded views and searches

- Views can also be created indirectly by using *relationships*: the document's metadata need not include all of the properties in order for the document to be included in the desired view. Instead, the properties may be the properties of other objects that have a relationship with the document in question (such as project or customer properties). This function can also be utilized with search results.
- The *Browse Relationships* function: It is now easy to browse these objects related to other objects, by using the new shortcuts located in the task area. For example, if the *Projects* is selected for use with the *Customer* object type, selecting the customer in M-Files Client and using the *Browse Relationships* function displays a list of all projects attached to the customer in question. Shortcuts from objects to other objects enhance accessibility and make searching for information linked with other information faster.
- Other new search functions include listing of time-related folders according to the actual date and time, dividing of search results automatically according to their properties, grouping by initial letter, looking for various inflected forms of the words in Quick Search, and using the selections *Include deleted items* and *Clear Filter*.

### 5. Common notifications

- By using *common notification rules*, you can order e-mail notifications based on objects saved in M-Files to be sent to several users or user groups. In this case, a notification concerning changes in, for example, the price list will be sent automatically to the entire sales department.

### 6. Other usability improvements

- Using a document template: When a document template is double-clicked in M-Files, it launches a new document based on the template in question.
- The properties of the object are displayed at the bottom of the Explore M-Files user interface, in the property area. Now it is easy to copy this information with the *Copy* function. You can also move directly to the properties of an object that has a relationship with the object in question from the property area.
- Other usability improvements: hierarchical relationships between value lists and object types, converting a value list to an object type, and metadata card improvements.
- Several improvements have been made also to M-Files Web Access.
- M-Files is now available in the following languages: English, Finnish, French, German, Chinese (Taiwan), Hungarian, Vietnamese, Slovenian, Portuguese (Brazil), and Polish.
- The M-Files is compatible with both 32-bit and 64-bit Microsoft Windows operating systems. The 32-bit and 64-bit systems have separate installation programs.

## 7. Diverse permission settings

- User-specific rights and permissions can be specified for various functions and properties. The rights apply to the adding and editing of objects and properties. Permissions can also be used to prevent or allow the visibility of various users and properties to desired users.
- It is possible to specify user- or user-group-specific edit permission with the *new permission settings*. The permissions can be used to restrict the visibility of various data within the company: for example, the social security number of an employee can be set to be visible only for users belonging to the personnel administration user group.

## 8. Replication

- Document vaults can be replicated from the main server to geographically separate *replica servers*. Opening objects from replica servers often makes it quicker to open documents for editing, because the connection to the main server may be slow. Therefore, replication makes accessing frequently used documents on client computers in geographically separate facilities much faster.

## 9. Importing and synchronizing user groups from Active Directory

- User groups can be imported by domain and also by organizational unit. This makes importing user groups into M-Files quicker and easier. M-Files can check for new and deleted user group members periodically.
- Importing a user group from a changed domain user group : The importing of a domain user group into M-Files can also be disabled, or edited to use another domain user group as its. For example, if the domain user group changes (e.g., it is renamed or the grouping is changed), the earlier M-Files user group can be merged with the new domain user group. This preserves the identity of the M-Files user group regardless of changes in the domain user group, and the permissions related to it can remain the same.

## 10. M-Files API

- The improved M-Files API (programming interface) enables creating workstation-specific applications. Previously, M-Files API was server-specific. Now, all changes made using the M-Files API are immediately visible to the M-Files Client user. This offers more possibilities for programming different applications. A good example of this is the improved Office integration, which has new features and enables, for example, using Office applications to display and edit features of a document saved in M-Files.
- Applications created by using the M-Files API are now also version-independent. Therefore, applications do not need to be edited when the M-Files software is updated.