



Move Beyond the Limitations of Traditional Windows Folders with M-Files Dynamic Views

A significant productivity drain in any company is related to storing and finding information. The typical approach for "managing" important company documents, to which multiple employees need access is to create traditional Windows folders on a network server and have employees store and retrieve documents from there.

Windows Folders - Chaos is Inevitable

The challenge comes in how to structure your network folders. Usually, it is easy when you start, you might choose to create folders for each customer or project, or you might have folders for sales, marketing, development, etc.

But what then? What about a customer in a different state/province or country, or a development project versus a support project? Do you create a top level folder for each country or state and then duplicate the folder structure for each geographic region? What about dates? Do you create a folder for each year or month at the top level or within each folder category?

Often a document is related to multiple categories; maybe an invoice needs to go in a folder for all invoices, and also in a folder for the customer to whom it applies.

Now imagine your whole company making these decisions, storing this file here and that one there, making copies, and putting one copy in this folder and one in that; updating files and putting the new version in a different folder. And on it goes until chaos reigns. Often no one really knows where the latest version of a file is located leading to multiple employees wasting time searching, and never really being sure if they have the latest data. Worse, sometimes the latest data is lost after being overwritten or inadvertently deleted.



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Move Beyond the Limitations of Traditional Windows Folders



M-Files Dynamic Views

M-Files allow you to move beyond the limitations of traditional folders with Dynamic Views.

With traditional Windows folders the folder structure not only defines where a file or document is located, it also defines how it is categorized. To find a file you have to open or browse to the folder in which it resides. Further, a file can only reside in one folder, unless the file is copied, or a shortcut is created and placed in multiple folders, creating duplicate files and clutter that waste time when searching, and worse, potentially leads to accessing files or using data that are out of date.

In M-Files, there is only one master file, document or object, and each object typically consists of the object itself, such as a Word document or Excel spreadsheet, and descriptive properties or keywords known as metadata.

Instead of trying to remember a complex file path or wandering around trying to browse to the right location, with M-Files you just enter a few simple keywords about the document and it is instantly located.

A Single File Can Show Up in Multiple Views

In addition, while only one unique master file or object exists in the M-Files vault, it can be grouped and displayed in different "views" according to the object's properties or metadata. This is a very powerful and unique capability of M-Files. The metadata of objects determine whether they show up in a particular view, and as such, the same objects can appear in multiple views based on the context of the "search." For instance, as shown in the figure below, an document having meeting date and workflow metadata will be listed in the following views:

1. Documents by Meeting Date
2. Documents by Workflow Status
3. Retention Classification

So stop wasting time with Windows folders and get organized with M-Files. Once you experience the benefits of Dynamic Views you'll wonder how you ever did without them!

For more information and a demonstration, please contact George Sparrow at 954.703.9817 or gsparrow@datanet.us