

M-Files®



**How M-Files Enables Efficient
and Safe Work from Anywhere**



Having the flexibility to work remotely is the new normal — at least that's what the experts say. Whether or not it is, there is no doubt that remote work has increased, and that increase is probably — at least partly — going to be permanent.

With this new normal, there is also an increased need for efficiency and productivity for the remote workforce. It is not enough to have meetings in Teams, or share documents in Outlook — or Gmail for that matter. No, there is a definite need for tools that will drive efficiency, while also further supporting security and compliance.

THE REALITY OF FLEXIBLE WORK

The reality of work has changed. Therefore, businesses need new ways and tools to ensure the productivity of their knowledge workforce.

Efficiency is especially important when businesses are challenged by a very demanding business environment. Yet, that efficiency is hard to realize if employees struggle to find all relevant data and documents while they work outside the office.

There are three fundamental questions your business needs to answer to get hold of the challenges created by working from anywhere.



CAN YOUR REMOTE KNOWLEDGE WORKFORCE ACCESS DOCUMENTS AND WORK EFFICIENTLY?



ARE YOU ABLE TO ENSURE A GOOD CUSTOMER EXPERIENCE WHEN COLLABORATING REMOTELY?

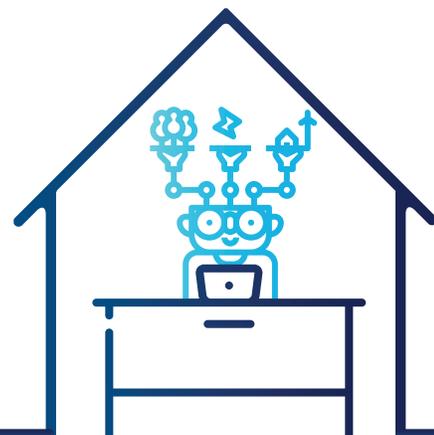


CAN EMPLOYEES MANAGE INFORMATION PROPERLY AND SECURELY WHEN WORKING OUTSIDE THE OFFICE?

If people do not have the right tools, they will resort to ad hoc ways of accessing documents and collaborating.

If people do not have a single version of truth — one version of any document, that everyone in the company uses — it can cause misunderstanding about what has been going on with the customer — what is the latest project, what is the status, are there any open support tickets or offers, etc. This means it is almost impossible to provide an excellent customer experience.

And if people resort to private, one-off tools, it leads to a loss of control and management of information, improper archiving of documents, and a lack of workflows to support the right way of handling agreements. This also leads to security challenges as the tools are outside the control of IT departments and might not adhere to the security standards of the company.



The Reality: By the Numbers

The above-mentioned challenges are widely recognized; according to AIIM, 62% of companies are completely reliant on network file shares. This means that in several cases, this information is not easily available when working remotely. Network file shares are often not available at all outside the company perimeter, and if they are, users need VPN connections to reach those silos. Those connections are often hard to use and can even fail to perform under pressure.

The mobility challenge is a very common one as well. According to Forrester, 57% of companies are challenged by security on mobile devices. In many cases, this also means that companies restrict access to company data and documents with mobile devices. This will of course affect the efficiency of remote workers in the field.

Finally, according to Gartner, almost half of employees (46%) have shared sensitive documents via personal file sharing accounts. This is a huge security risk to the company. These personal accounts can be more vulnerable, and are often totally uncontrolled by the company and its IT department.

62%

Are completely reliant on network file shares

57%

Are challenged by security on mobile services

46%

Of employees have shared sensitive documents via personal file sharing accounts

THE VOICE OF THE CUSTOMER

“Many of our staff travel frequently, or literally work from the middle of a field. The mobile app allows them to work more efficiently as they can access information, submit expense claims, complete tasks or approve documents without having to wait until they are back in the office.”

Mike Harris
Finance at Jupiter Group



At the end of the day, information management is about creating visibility and control over the documents and data in the company, and how those documents are created, accessed, edited, shared, archived, or deleted.

01

**THERE IS NO SECURITY
WITHOUT PROPER
MANAGEMENT OF
INFORMATION.**

02

**THERE IS NO PROPER
MANAGEMENT
OF INFORMATION
WITHOUT CONTROL.**

03

**AND THERE IS
NO CONTROL
WITHOUT
VISIBILITY.**

It is a cycle where all the pieces are codependent and need to be in their proper place.



THE M-FILES SOLUTION TO THESE CHALLENGES

M-Files provides the same user experience whether you are working remotely or at the office.

01



IMMEDIATELY CONNECT TO ALL DATA

02



SAME VERSION OF TRUTH FOR EVERYONE

03



PROTECT & CONTROL YOUR SENSITIVE BUSINESS DATA

THE VOICE OF THE CUSTOMER

“As a national bank, our staff and operations are centralized at our head office and physical branches throughout the US. As a longtime M-Files customer, we’ve been able to seamlessly transition to a virtual work environment without skipping a beat. We have also recently been able to quickly automate new business processes with M-Files to address the rapidly accelerating Paycheck Protection Program loan application volume. This has been an invaluable asset in delivering on our promise of helping customers with a sense of urgency and accountability.”

Jen Dingmann
Systems Analyst Manager,
Stearns Bank N.A.





IMMEDIATELY CONNECT TO ALL DATA

M-Files allows you to get instant return on investment as you can immediately connect to all data without the need for initial migration. You can connect business data and documents into one view regardless of the origin of that data.

THE VOICE OF THE CUSTOMER



“It was often taking our staff half a day to simply locate a document, and we needed a solution that would help us gain visibility and control of information across the whole organization. If we cannot quickly locate information required by our tenants, the board, or a member of the council, we risk damaging our reputation and even fines.”

Kristin McIntosh
Project Research Officer, Newark & Sherwood Homes

The connections are immediate as M-Files offers ready-to-implement connectors to most common systems. Additionally, there is the ability to build more connections with APIs.



SAME VERSION OF TRUTH FOR EVERYONE

Second, M-Files will help you avoid the version chaos of documents shared with different tools or stored in several folders and other places. It allows everyone to access the same document based on their own user and access rights, which are governed by their role in the company.

THE VOICE OF THE CUSTOMER



“Having all the data in one place, having the historical versions of those documents all there and readily available, but knowing that you are looking at the most up-to-date, current document is invaluable.”

Julie Barlow
iGas

M-Files allows you to connect documents to customers or projects, or any other relevant context. But you always have just one single, valid version of any document. This single source of truth will help you provide excellent customer service whether your employees work remotely, or from the office.



PROTECT & CONTROL YOUR SENSITIVE BUSINESS DATA

Finally, there is an urgent need to work and collaborate remotely – but to do it in a way that will help you protect and control your sensitive business data. That means adherence to guidelines, policies, and regulations. You can automate your workflows and processes and be ready for a more efficient and secure future.



THE VOICE OF THE CUSTOMER

“At TEAM, we have the vision to maximize quality and efficiency through digitally-enabled workflows. M-Files has helped us create solutions to intelligently manage critical operational documents for our technicians in the field.”

Tracy Terrell
CIO, TEAM Industrial Services



REAL USE CASES

When people work remotely, the old, traditional ways of handling documents no longer work.

From paper-based processes to digital & remote

A global electronics supplier digitized their whole European salesforce with M-Files.

THE PROBLEMS



Paper & Markings



Multiple versions of the truth

WITH M-FILES



Build work queues of all sales orders



Check and review documents in process



Control access only for roles who need it in the process

THE BENEFITS



Salesforce quickly finds all information and stays connected and efficient



Everyone has the same data and can easily collaborate with customers



Everyone follows agreed processes and archival rules

From a traditional process with printouts and markings, they changed the whole process to a digital one. Now M-Files lets them build work queues of all sales orders, check and review documents, and drive the process forward through multiple sales roles in the process. They can automatically control access — granting permissions only for roles who need it. This way, they know everyone who needs access to the information gets the same version of the document.

All this can now happen from the remote home office. The sales force stays connected and efficient, has the same version of customer-related data available to efficiently serve customers, and follows established processes and archival rules.

Going Mobile

A global accounting and consulting company enabled their entire knowledge workforce to work remotely with M-Files.

THE PROBLEMS



Need to update the whole infrastructure



Hard to manage access



Hard to manage changes and different versions

WITH M-FILES



New, digital work processes



Mobile access to all documents



Automatic access control with groups and subgroups

THE BENEFITS



Added control and security



Single repository for all document types



Integration with other business systems, such as CRM

The company was facing a need for a complete overhaul of their existing IT infrastructure. It was especially challenging for them to manage access to documents in an easy and flexible way that would also ensure the security and privacy of data. Additionally, managing several versions of documents created during the editing process was proving to be a nightmare.

After finding M-Files, the company now has been able to implement new, digital work processes and allow employees mobile access to all documents. This hugely improves their ability to access necessary documentation regardless of where the employee happens to be. The digital processes enhance control over how documents are managed, adding a new layer of security. The fact that all documents are now stored in a single repository and integrated with other business systems brings added efficiency to work.

CHOOSE A FUTURE-PROOF SOLUTION

When there is an urgent need to go remote, you might be tempted to choose something that seems to quickly let you store and share documents in a remote setup. There are, however, some pitfalls with the so called quick and easy solutions:



They offer no support for business processes.



They are not integrated with your existing systems, and most likely cannot be in the future either.



And finally, documents need to be migrated first before getting any of the benefits.

Due to these issues, these solutions offer only limited value. In fact, by implementing a quick fix, simplistic file-sharing and storage system, you could be doing more damage than good by establishing yet another document repository — another island where files live. The alternative is to migrate all of your data into that file-sharing application and anyone can see how a large migration project is not what you want to manage in the middle of a challenging business situation and with key staff working remotely.

You need a future-proof solution that can bring immediate access to all your documents and data without migration — but do that in a way that can be integrated with the rest of your infrastructure and your business processes.



THE VOICE OF THE CUSTOMER

“When we told everyone they had to start working from home, having our document management cloud-based really made the transition seamless. There was almost no disruption to normal business operations and productivity stayed high.

Greg Fulk
Valeo Financial Advisors

SUGGESTED USE CASES FOR M-FILES IN A FLEXIBLE WORK ENVIRONMENT

On top of the use cases presented above, we see obvious use cases for M-Files in a flexible work environment to either increase the efficiency and productivity of remote work, or to increase security and compliance.

Collaborate and communicate with Microsoft Teams — without information security risk

Microsoft Teams is shaping the way companies communicate and collaborate. However, a good part of collaboration and communication happens with documents. In Office 365, documents and files are still managed in a static way and they are also stored in silos for different teams and channels

This approach makes it challenging for companies to ensure operational transparency and legal compliance — two topics that are very important nowadays. Looking a bit deeper, we have identified four areas where Teams represents a challenge for information governance.



01 | ELIMINATE INFORMATION SPRAWL

First, it is about the type of information we wish to control. Connecting to other business systems (such as ERP, CRM, or another document management system) is currently not possible. Additionally, it can be problematic to connect to common archives (Dropbox, Box, Google Drive). One employee could, for example, connect their personal Dropbox account to Teams, move a bunch of files around, and IT would not necessarily be privy to it — further proliferating shadow IT.

With M-Files, the organization decides what to integrate M-Files with, maintaining control over what archives or tools its employees can use. And once the connection is forged, it is possible to access documents saved in the ERP or CRM, or in Google Drive, Dropbox, and many other systems directly from Microsoft Teams.



ACCESS INFORMATION DIRECTLY
FROM MICROSOFT TEAMS



02 | ELIMINATE DUPLICATES & VERSION ISSUES

Second, there's duplication of documents. For example, you might have a team for a project, with all the documents related to that project stored in the automatically created SharePoint site. What happens when the legal department wants to keep an eye on legal documents — like contracts, NDAs, and agreements? Or when another project team needs access to documents? Or what if some of the documents are in the ERP or in a network folder? Right now, the most common case is that the document would be duplicated. And of course, this means control is lost:

With M-Files for MS Teams, documents never have to be duplicated. Different teams might have default visibility on certain sets of documents, in order to improve their productivity. For example, a project team might have a default view on that project's documents, while a legal team might have a default view on all legal documents. But it's always possible to access all other documents in M-Files or other connected archives based on the user and access permissions — which in turn, are based on the employees' roles. Every document is unique, it has its history, and is a single source of truth.

?

WHAT'S THE
MOST RECENT
VERSION?

?

WHAT CHANGES
HAVE BEEN
APPROVED?

?

WHAT VERSION
DO WE NEED TO
RETAIN?

AND SO ON...

03 | PROMOTE EFFECTIVE INFORMATION LIFECYCLE

The third issue is information lifecycle management. Official documents, like contracts, need to be circulated around for review, comments, approval, and signature for example. And when they expire, they need to be archived and retained to comply with standards and laws. Workflows are not native to Microsoft Teams, and therefore documents need to be moved from one state to the next manually.

M-Files also brings workflow functionalities into Teams. A contract, for example, can be moved from one state to the next with one click, and the people who need to act on it will be notified immediately. Archival and retention policies can be automated for certain classes of documents, and they will be valid even once the channel or the team has been archived or deleted.



EFFICIENT WORKFLOW IN TEAMS



04 | KEEP SENSITIVE DOCUMENTS SAFE AND SECURE

Finally, there is the risk of accidental leaks. By default, when someone is invited to a channel, they can access all documents in the SharePoint site of the team. Some of these files, though, might contain sensitive information, or information about other projects, customers, partners.

M-Files uses Azure AD, and so the permissions that are set within M-Files are transferred to Microsoft Teams. Depending on the group or the role of the user, or depending on them being internal versus external, it will be determined whether they can access all the documents or only some of them. So, for example, a supplier can still be invited to the channel, they can follow the conversation and contribute



PROTECT YOUR SENSITIVE DOCUMENTS & DATA



How M-Files Enables Efficient and Safe Remote Work

Automate your interactions to increase efficiency

Working in a remote setup can be especially challenging when there is a need to collaborate with others to get tasks done. You don't have that natural interaction you would at the office and cannot simply ask the person next to you to act, or to follow up the status of a certain project.

M-Files lets you automate some of these interactions related to documents. You can easily assign tasks to a colleague and set deadlines and schedules for those tasks to automatically notify how they proceed.

You can also automate assignments as a part of regular workflows so that certain types of documents always get managed in a regulated way.

There is no longer a need to send a reminder email to follow up on assignments. You can just add notifications to set reminders.

THE VOICE OF THE CUSTOMER

“With M-Files tools and a well-trained staff, we can work anywhere, find anything, and monitor everything through common views and transparent work assignments. Team-based workflows and access rights ensure that work assignments are visible to our teams so they can be completed, even when particular staff are unavailable due to personal or business schedules.”

Brian Morgan
Chief Operating Officer,
MedTrials



This is all very valid in a situation where a workforce is not even working from home, but from wherever with just a mobile device — whether it's an airport, hotel, client location, coffee shop... anywhere.

THE VOICE OF THE CUSTOMER

“In the past, participation in the document approval process for our remote office staff was impossible. But now with M-Files, our staff can access, review and approve information from wherever they are.”

Rick Mueller
IT Manager, Pediatric Home Services



M-Files offers the same user experience whether you use it from the desktop, web, or mobile application. Everything is available, even offline when necessary as you can take documents offline either manually or automatically to access them when there is no internet connection available.

SUMMARY

Remote working has become a part of our lives. According to a recent research paper by Gartner, 88% of organizations have encouraged or required employees to work from home.

Efficient, productive, and secure remote work really calls for proper tools to manage documents and content. Especially in knowledge work, documents are a core deliverable, and therefore, managing them efficiently is vital. Visibility and control remain the key enablers of efficient information management.

Visibility and control are translated into the practical questions introduced at the beginning of this paper and each business needs to answer these questions to estimate their remote work readiness.

So, ask yourself:



CAN OUR REMOTE KNOWLEDGE WORKFORCE ACCESS DOCUMENTS AND WORK EFFICIENTLY?



ARE WE ABLE TO ENSURE A GOOD CUSTOMER EXPERIENCE WHEN COLLABORATING REMOTELY?



CAN OUR EMPLOYEES MANAGE INFORMATION PROPERLY AND SECURELY WHEN WORKING OUTSIDE THE OFFICE?

Read more about M-Files at www.m-files.com



Multifile

About CIMS

For more than two decades, CIMS has been a leading full-service document management solutions provider delivering document management, business process workflow, paper and e-document capture, forms processing using OCR, ICR, and Mark Sense recognition, Accounts Payable automation, case management (DCM), robotic process automation (RPA), and ISO 9000 solutions. CIMS uses tested, proven, and scalable software tools to leverage technology that delivers complete turnkey solutions, that improve productivity, enhance collaboration, and reduces manual labor.



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