



Building a metadata-driven DMS SharePoint 2013 vs. M-Files 10.0

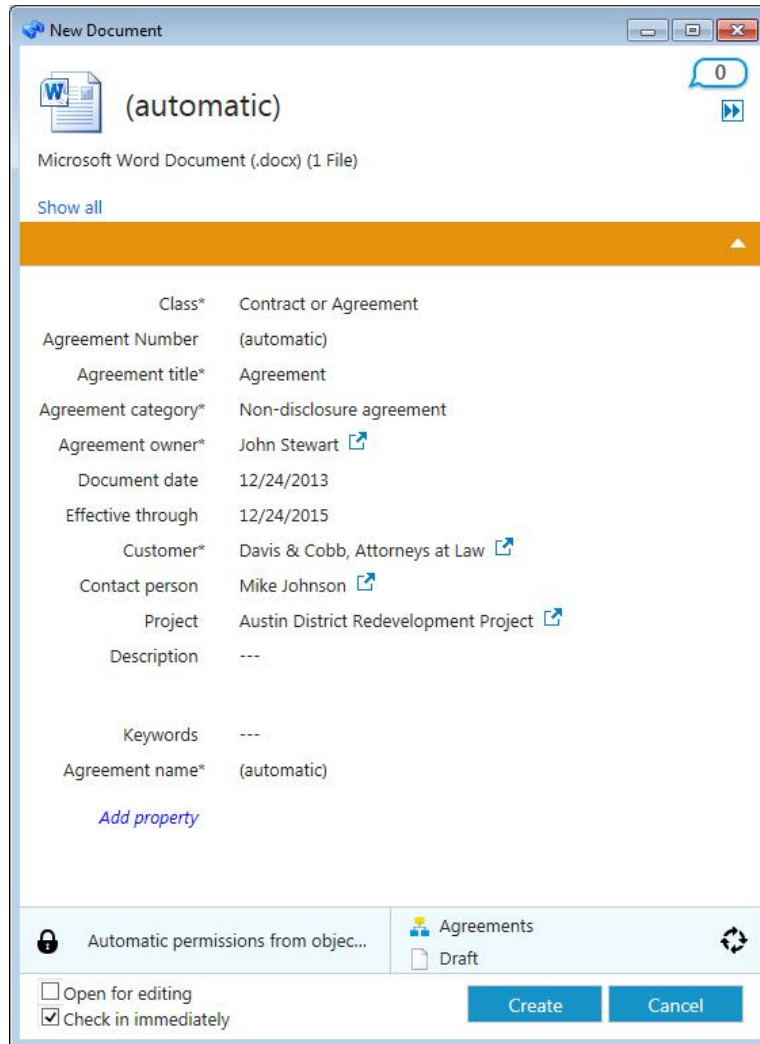
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THE M-FILES WAY OF DOCUMENT MANAGEMENT



Classify content by *What It is*



New Document

(automatic)

Microsoft Word Document (.docx) (1 File)

Show all

Class*	Contract or Agreement
Agreement Number	(automatic)
Agreement title*	Agreement
Agreement category*	Non-disclosure agreement
Agreement owner*	John Stewart
Document date	12/24/2013
Effective through	12/24/2015
Customer*	Davis & Cobb, Attorneys at Law
Contact person	Mike Johnson
Project	Austin District Redevelopment Project
Description	---
Keywords	---
Agreement name*	(automatic)

[Add property](#)

Automatic permissions from objec...

Agreements

Draft

Open for editing

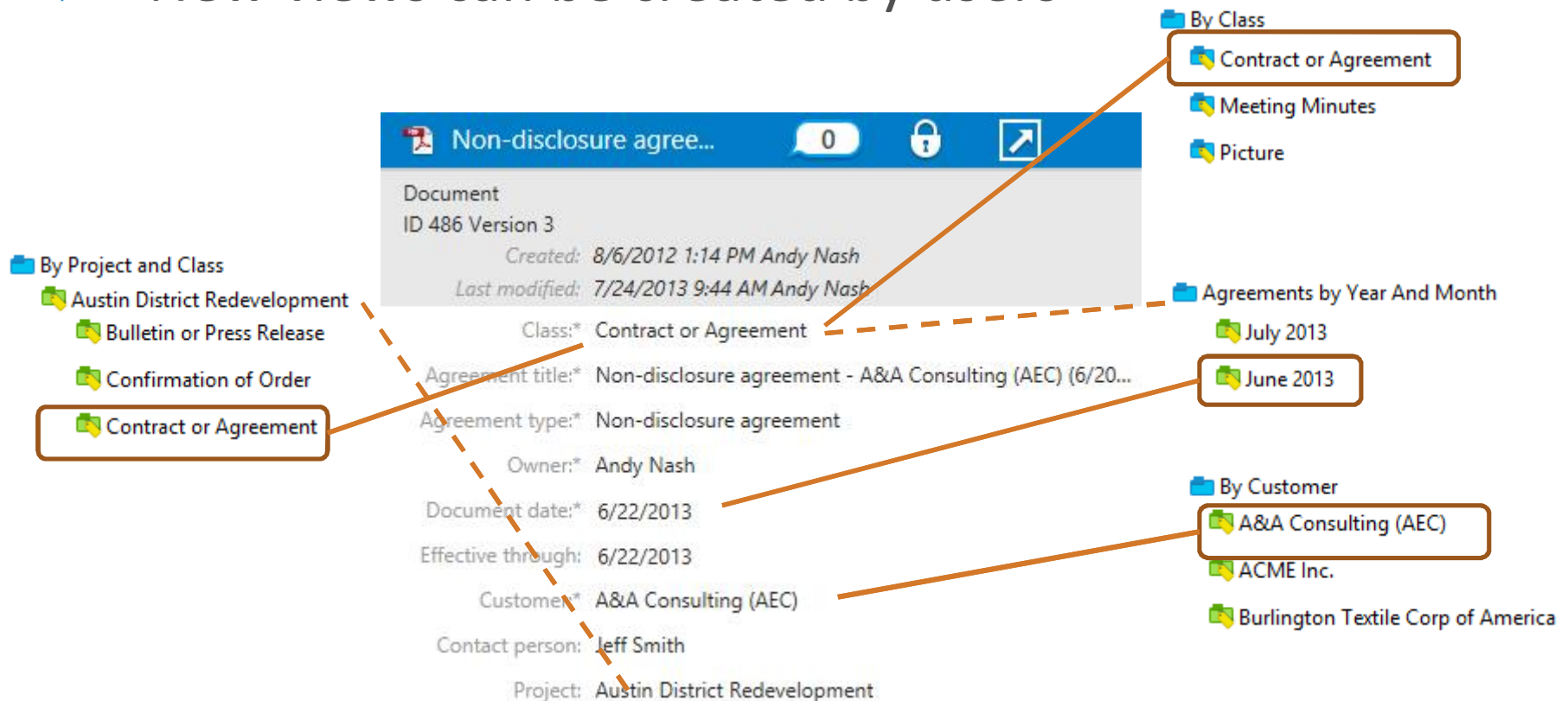
Check in immediately

Create Cancel

- ▶ Classify content by what it is rather than by where it should reside:
 - Class = Agreement
 - Agreement type = NDA
 - Customer = David & Cobb
 - Project = Austin District...
- ▶ More difficult is to say if the agreements should be grouped by:
 - Customer
 - Project
 - Type
 - Month
 - Expiry date
 - Owner
 - Or by some other property

Documents appear in all relevant views automatically

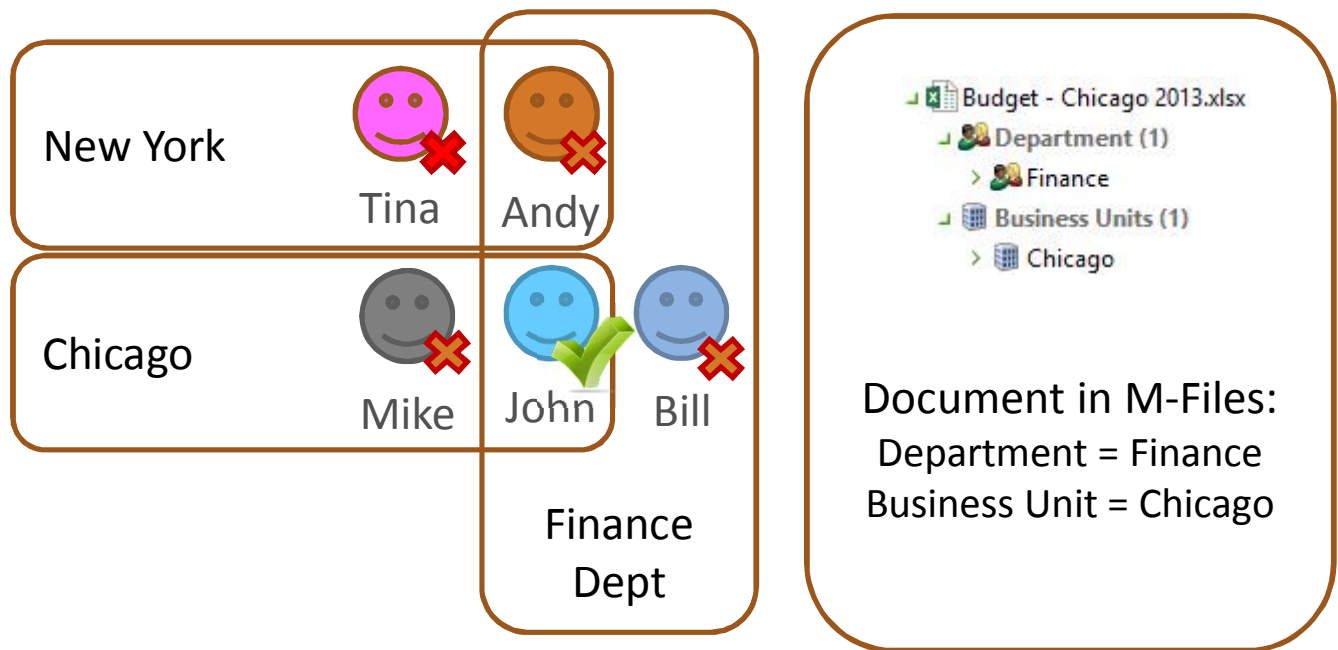
- ▶ Only one copy in the system
- ▶ New views can be created by users



The screenshot displays a document titled "Non-disclosure agree..." with ID 486, Version 3. The document metadata includes creation and modification dates, class, agreement title, type, owner, date, effective through date, customer, contact person, and project. The document is connected to several views:

- By Class:** Contract or Agreement, Meeting Minutes, Picture
- By Project and Class:** Austin District Redevelopment, Bulletin or Press Release, Confirmation of Order, Contract or Agreement
- Agreements by Year And Month:** July 2013, June 2013
- By Customer:** A&A Consulting (AEC), ACME Inc., Burlington Textile Corp of America

Manage Permissions by *What the Content is*



- ▶ Permissions can be based on multiple properties:
 - For example employees can access only the documents related to their business unit and department
 - Only John sees the Budget for Chicago because he belongs both to the Chicago group and Finance group

USE CASE SCENARIO PRESENTATION



Document Management Environment

- ▶ Different types of documents
 - **Agreements**
 - Expire on certain date
 - Related to customer and project
 - **Drawings**
 - Different revisions, different types (Mechanical, Electrical, etc.)
 - **Project Plans**
 - Related to project
 - **Proposals**
 - Related to customer and project

Key needs

- ▶ Internal and external users
 - Internal users need to have access to most documents
 - External users can only access drawings of the projects where they are members of
 - Only Legal department can access agreements

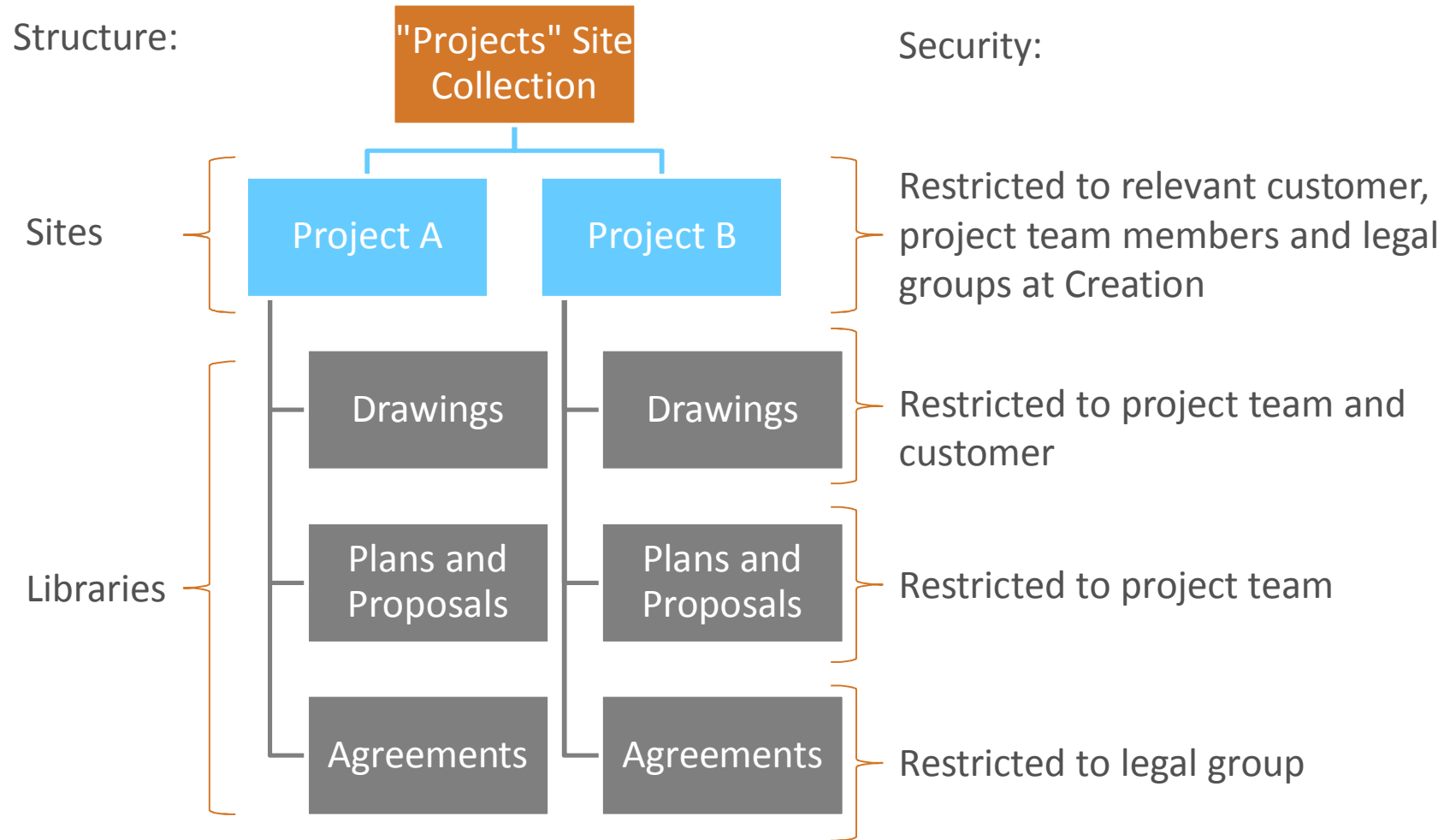
CAN YOU DO THIS WITH SHAREPOINT
2013?



SharePoint and metadata

- ▶ Documents in SharePoint 2013 have metadata and metadata can be used to classify and organize content
 - Access control settings cannot be based on metadata in SharePoint 2013
- ▶ Two options
 1. Create a site collection for projects and a sub-site for each individual project. Create various document libraries for the different types of documents or security needs
 2. Leverage Document Center

Option 1: classify content with sites and libraries



Option 1: Site collection for projects, a site for each project

- ▶ Probably the best practice to address the needs of this use case
- ▶ Benefits
 - Easier to manage permissions
 - Still not possible to manage permissions by metadata
 - Probably easier for users
- ▶ Weaknesses
 - Replicates the problems of traditional folder structures
 - It is not possible to list within a folder all expiring Agreements related to any project
 - Where to save?
 - What if a document is needed for two projects?
 - What if a project has two customers?
 - Security structure is fragile
 - Security must be managed at the folder level to maintain simple management
 - Altering security to provide more access makes it difficult verify who has access to what or update security settings in the future

NOT AN OPTION TO
LEVERAGE THE
METADATA APPROACH














Option 2: Leveraging Document Center

- ▶ One large silo for all documents (like in M-Files)
 - Content is organized by metadata
 - Probably the only way to replicate the M-Files approach to classification
- ▶ Benefits
 - Possibility to leverage metadata to organize documents using views (like in M-Files)
 - Documents by Projects
 - Agreements by Type
- ▶ Weaknesses
 - Permissions need to be managed manually document by document
 - Unveils the weaknesses in SharePoint metadata management
 - Large datasets run the risk of exceeding SharePoint limitations on documents in a view and users need detailed knowledge of the system to create personal views correctly











M-FILES VS. SHAREPOINT IN METADATA MANAGEMENT



Metadata Management

Feature	SharePoint 2013	M-Files 10.0
Possibility to add metadata for documents		
Different data types supported		
Class-specific properties		
Filtered properties	Limited	
Control visibility of property values		
Mandatory / optional properties		
Mass-editing of document metadata	Limited	
Searching from metadata	Limited	
Security Capabilities	See Detailed Table	

Security and Access Control

Feature	SharePoint 2013	M-Files 10.0
Automatically restrict access based on metadata		
Grant access to only the intersection of two or more security groups		
Grant access to the union of two or more security groups		
Centrally manage granular security settings across the entire repository		
Search for objects based on object's security settings		

Access Control Management

- ▶ Difference:
 - SharePoint was designed to make it easy for everyone to access everything. Restricting access can be done, but it comes at a price
 - M-Files was designed to provide both access as well as control. Facilitating the CORRECT access is a core feature of M-Files
- ▶ Why it matters:
 - SharePoint: Designing a SharePoint architecture to facilitate secured access can be done, but it comes at the price of having to follow that structure rigidly. The WHERE of the document matters above all else. If it doesn't, administration is a nightmare. Understanding the structure of security settings becomes increasingly difficult as site collections and sites and folders and sub folders and individual documents proliferate and there is no central management.
 - M-Files: users describe documents with metadata and permissions are automatically set. Access Control Policies are always followed

Filtered Properties

- ▶ Difference:
 - SharePoint: Properties are not filtered based upon other properties to only display to users the relevant data. (e.g. only showing contacts available at a selected customer). Managed Metadata can provide some assistance, but comes with other limitations.
 - M-Files: Properties are filtered automatically based on the parent property value
- ▶ Why it matters:
 - When working with large value lists, filtering helps user to select the right sub-property value from the list
 - SharePoint: users must select values from all possible values and nothing prevents users from selecting invalid data, such as selecting a contact person not associated with the customer
 - M-Files: users are not shown invalid property values to select from

Filtered Properties: SharePoint

Contact person list is not filtered based on the selected customer

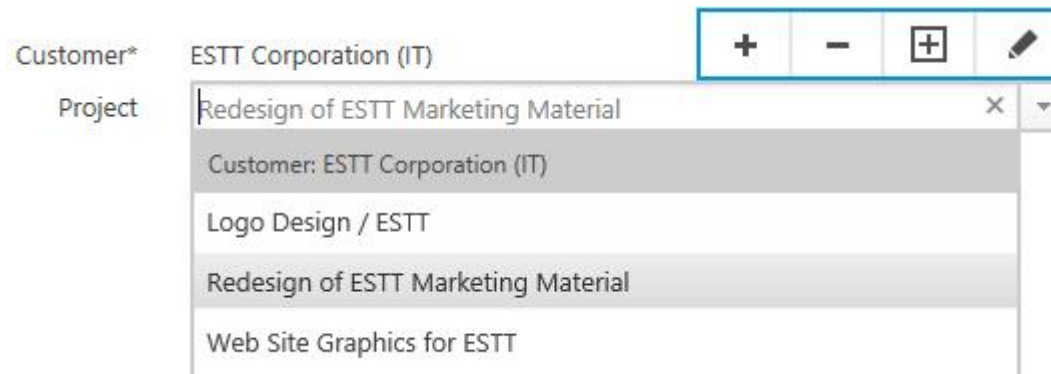
Customer *

Contact person

- (None)
- Alan Stone
- Ashley Brown
- Ben Griffith
- Bill Warwick
- Christopher Moore
- Daniel Hall
- Debbie Smith
- Don Ortiz
- Elisabeth Chapman
- Eric Brewer
- Eric Gardner
- Gordon Ray
- Helen Chase
- Jeff Smith
- Jim Black
- Jim Reece
- Kelly Romarco
- Laurel Johnson
- Lewis Hawkins
- Lisa Jenkins
- Matthew Miller
- Michael Antoine
- Mike Johnson
- Nancy Hartwick
- Nicole Scott
- Patrick Ellis
- Paula Smith
- Peter Cobb
- Robert Brown

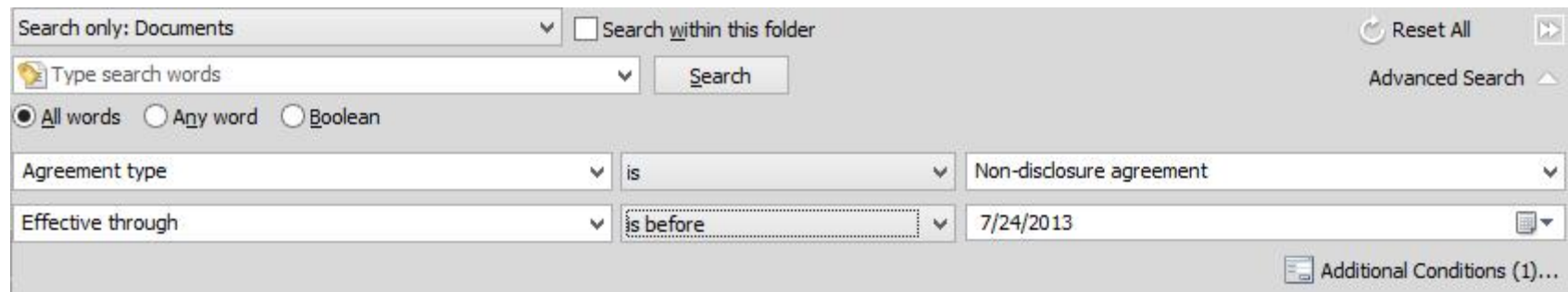
Filtered Properties: M-Files

Properties can be filtered through other properties: projects by customers, for example



Searching from metadata

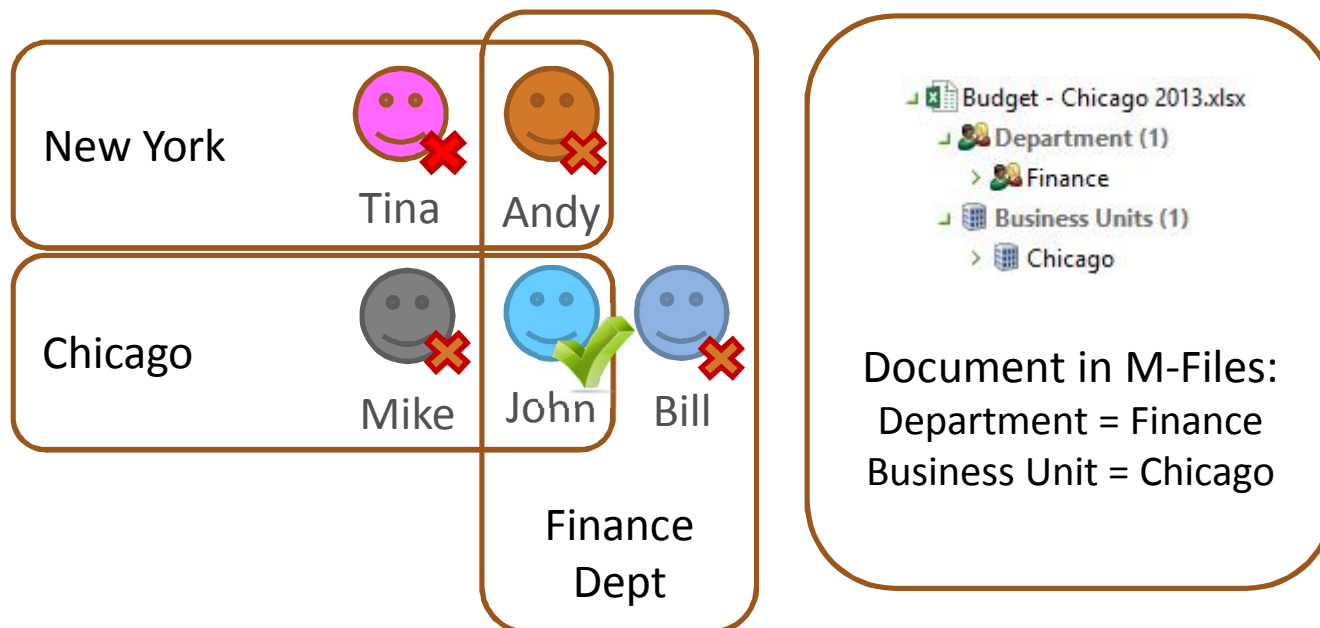
- ▶ SharePoint: Administrators must select which properties are indexed and which may be used to refine search results. Setting up search can take a lot of work.
- ▶ M-Files: All metadata and file contents are indexed automatically. Additionally, any metadata property may be used to refine a search. Search is enabled without any additional configurations



The screenshot displays the M-Files search interface. At the top, there is a dropdown menu set to "Search only: Documents" and a checkbox for "Search within this folder". To the right are "Reset All" and "Advanced Search" buttons. Below this is a search input field with a magnifying glass icon, a "Search" button, and radio buttons for "All words" (selected), "Any word", and "Boolean". The main search area contains two rows of filters: "Agreement type" with a dropdown set to "is" and a text field containing "Non-disclosure agreement"; and "Effective through" with a dropdown set to "is before" and a date field containing "7/24/2013". At the bottom right, there is a link for "Additional Conditions (1)..."

Metadata-driven permissions

- ▶ SharePoint: not supported
- ▶ M-Files: any metadata property or combination of properties can define the effective permissions of the document



Configuring Views

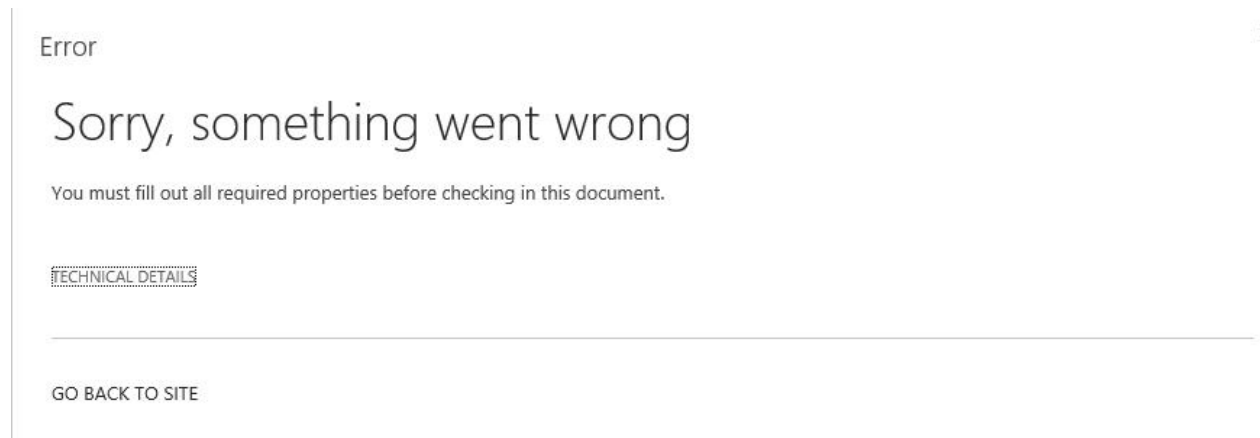
- ▶ One of the key advantages to leverage metadata: possibility to access the same content through multiple views
- ▶ SharePoint: basic views can be created but:
 - Views are constrained to only show documents within a single library
 - Grouping functionality is limited
 - group by Content type requires very limiting trade-offs
 - No group by multi-select properties
 - No group by by First Letters and Initial Groups: views like documents by project are not practical because navigating becomes virtually impossible with large number of projects
 - Users cannot create views based on what they recently accessed
 - Indirect metadata is not supported in the views
- ▶ M-Files: all of the above works out of the box

METADATA CARD USABILITY



Checking documents in

- ▶ SharePoint: 3 clicks to check in, 2 clicks to re-open the metadata card if you forgot to fill all the properties



- ▶ M-Files: one click to check in, immediate access to metadata if you forgot to fill out a property

Context awareness

- ▶ SharePoint: default values are difficult to maintain as they are hard coded to specific locations or globally for a property. There is no automatic context sensitivity.
- ▶ M-Files: metadata is prefilled based on the view to which user drops the file

Form controls

- ▶ SharePoint: basic web form controls, difficult to choose the value from a long list
 - No type ahead functionality in standard drop-down lists
- ▶ M-Files: smart controls with filtering

Contact person:

- Debbie Smith
- Jeff Smith
- Paula Smith
- Thomas Smith

Contact person

(None)

- Alan Stone
- Ashley Brown
- Ben Griffith
- Bill Warwick
- Christopher Moore
- Daniel Hall
- Debbie Smith
- Don Ortiz
- Elisabeth Chapman
- Eric Brewer
- Eric Gardner
- Gordon Ray
- Helen Chase
- Jeff Smith
- Jim Black
- Jim Reece
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