

Optimizing Your Microsoft Investment

HOW A KNOWLEDGE WORK AUTOMATION PLATFORM CAN TRANSFORM YOUR M365

With Word, PowerPoint, Excel, SharePoint, and dozens of other helpful office tools, Microsoft 365 has evolved into the modern must-have productivity suite for the vast majority of organizations worldwide. While M365 makes content authoring and collaboration more agile and easier, it's basically a collection of independent or loosely connected tools.

Users often use M365 out of the box, hoping to somehow cobble together a useful information management solution. A knowledge work automation platform can integrate with M365 with improved support for business processes and information governance.

The *Pain Points* of Information Management

56%

of organizations say their document management systems don't connect with other systems in place.

“SharePoint does very well, but we wanted a system that didn't depend on what a file is called for people to be able to work with it, hence our selection of M-Files. You can reduce error-prone processes by getting them in your document management system; you're improving the quality of what you do and reducing the time to do it.”

IT Manager
UK based Engineering Company

CHALLENGE 1

INFORMATION CHAOS = LOW PRODUCTIVITY

- Microsoft tools do not include a plan or policy mapping how information is managed.
- Information sprawls across systems; employees can't find the right information.
- Documents are duplicated, version control fails, and access management can't adjust to change.
- Knowledge workers waste time finding the right information, get frustrated, and re-invent the wheel leading to poor productivity.

THE SOLUTION

- M-Files connects Microsoft and non-Microsoft systems to create a single source of truth over enterprise data.
- M-Files search capabilities helps find information based on what it is rather than where it is.
- M-Files enables control over document access, versions, publishing, and distribution.

80%

of surveyed workers say they've recreated documents which already existed because they were unable to find it on their corporate network.

“Each of the departments found SharePoint useful because they had it set up for how they work specifically. What wasn't working was a single point of truth for our engineering information at organization level. Now we have M-Files as our engineering information management system that handles process automation, auto-classification, document numbering, and review and approval workflows. We made it accessible to contractors, vendors and suppliers so they do document control directly in M-Files.”

Digital Information Manager
US based Oil and Gas Company

CHALLENGE 2

LACK OF CONTENT CONTEXT

- Information management relies on manual processes and employee diligence.
- M365 lacks automated rules on how to name files or where to store them.
- Documents aren't automatically connected to business data or processes.
- Business processes must be tracked manually, wasting time and money.

THE SOLUTION

- M-Files connects documents to business data to drive daily workflows and processes.
- M-Files guides users when creating new content or filing existing documents.
- Details like file naming, permissions, or the next reviewer are automated.
- Workflows, views, tasks, and notifications help keep daily work organized.

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The number of disconnected data repositories companies use on average to store information.

“The advantages of M-Files are its flexibility and adaptability to different business needs. We can use M-Files in all of our enterprise content management development projects, as the integration with other business systems is seamless.”

Lauri Vanhanen
System manager for integrations and cloud services
Caruna

CHALLENGE 3

COMPLIANCE COMPLEXITY

- Following compliance policies requires extra work and rely on manual tasks.
- Audit trails break down due to access control issues and document duplication.
- Compliance doesn't follow the speed of business and audits create unnecessary workloads.

THE SOLUTION

- M-Files automates access controls to follow the rhythm and rules of any business.
- Industry, standard and regulatory compliance controls are embedded into daily work.
- Automated workflows seamlessly gather and retain compliance evidence.
- Each content access and edit creates an electronic audit trail.

MULTIPLIES THE POWER OF

Microsoft 365

M-Files integrates into Microsoft 365 and acts as the **single point of access** for all enterprise data. You can find, access, and manage all connected data, regardless of its repository through Microsoft user interfaces.

Add information governance over documents accessed from Teams.

Connect Outlook emails and attachments with your clients and projects

Organize information across multiple SharePoint sites and search with business relevant criteria.

Access and use information from non-Microsoft repositories directly in Teams, Outlook, SharePoint, Word, Excel, and PowerPoint.

SCHEDULE A DEMO

to learn how M-Files can help super-charge your organization's Microsoft 365 investment.