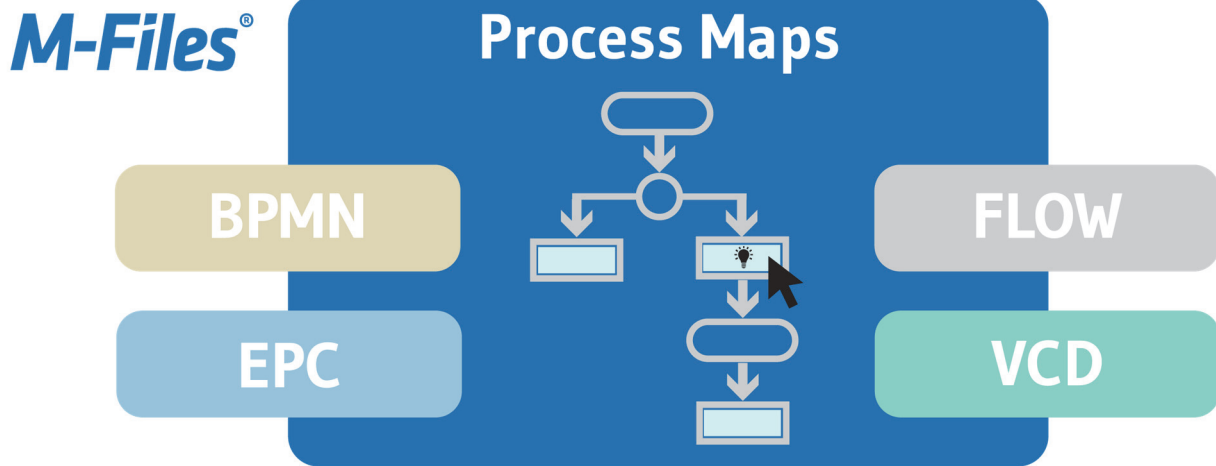


M-Files Process Maps



What is the Process Maps Add-on?

The key idea is already in the product name: **Maps** allow to visually navigate among pieces of documented information stored in M-Files. **Process maps** guide users to the right information in a natural and comprehensive way. The guiding line may be along processes, organizational aspects or abstract concepts the M-Files users shall understand and adhere to. The add-on includes a designer application to create maps, which supports multiple charting methodologies and an interactive preview for consumption, interaction and navigation. Tightly integrated with the M-Files metadata model, maps can display dynamic content, place holders, links to maps, views and further M-Files content.

Organizations need M-Files to help employees create, manage and find information in a sustainable and structured way. Rules and regulations are more and more an important part of daily business routine. Understanding these rules, accessing the correct up-to-date information when adhering to them and finding the right supporting documents is key. Process Maps guides users to relevant content. Graphical process maps combine and connect flowcharts with relevant content i.e. checklists, templates, legal reference information and provide action buttons within these

maps to execute queries, edit documents, invoke tasks or assignments and much more.

One scenario is to create an environment for Visual SOP Management: Many M-Files users were using PowerPoint, Word, SmartDraw or Visio to create Process Maps. The challenge is: These are single files which are not connected. A map, supporting documents and data records (like suppliers or equipment and organizational elements like departments, people in their roles) are all separate. With the Process Maps add-on, all of this documented information (to use the ISO term) is connected for interaction and any changes to information are recorded with audit trail.

Technically, it is a vault application which provides an "invisible" server piece and a client extension, that includes both an editor to 'draw' maps and a viewer for interactive consumption of the maps.

The editor supports multiple notations like BPMN, EPC, flowcharts and free design concept maps. You can design maps by dragging symbols, shapes and even M-Files objects on a canvas, inserting metadata as text or creating links between M-Files objects. Further on, these maps can be made interactive to browse M-Files content, create new documents from a template etc.

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FUNCTIONAL OVERVIEW

The M-Files Process Maps offers numerous ways to smartly enrich your M-Files document vaults:

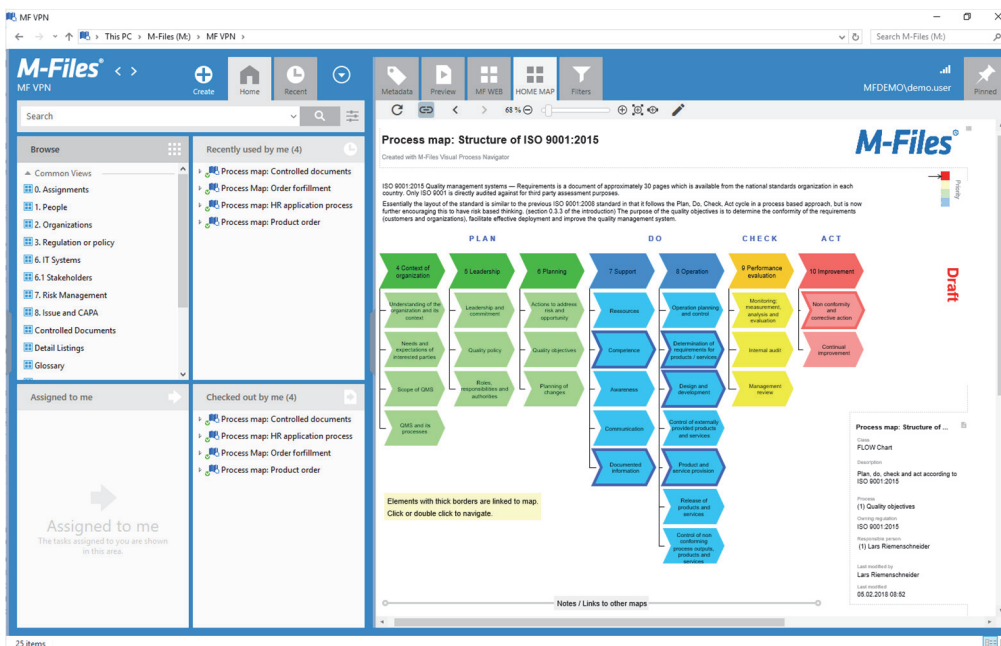
- Use and navigate maps in separate preview tabs in M-Files client
- Graphical editor for modelling of complex business processes according to BPMN 2.0, traditional flow charts, Event driven process chains (EPC), Value Chain diagrams (VCD) and free-style concept maps
- Navigate within a map and from map to map using anchors and viewports
- Show metadata of existing M-Files Objects as text or tooltip (including use of M-Files placeholder technique)
- Create and use M-Files Links within maps (search, view, open, edit and create)
- Insert text, images, shapes and hyperlinks (URL, Mail and Skype)
- Works with any document vault (required object type and its classes are added during installation automatically)
- Any M-Files object type and class can be mapped to symbols like process, task, pools/lanes and departments to predefine/force certain properties for M-Files objects on maps

BENEFITS

- Put information in M-Files in a visual context
- Make complex information easier to understand and better to remember by presenting it in a graphical way
- Improve user experience by providing an intuitive, fun and easy way of finding and interacting with information
- Support process-driven thinking and present the relevant contextual information

USE CASES (OUT-OF-THE-BOX)

- Visualization of processes and sub processes for a better understanding of information flow and responsibilities
- Organization charts using existing M-Files Objects of type department, site and person
- Floor maps of facilities, visualizing their metadata and navigation to relevant documents, machines or assemblies
- Multilevel overview of relevant SOPs and navigation to their latest released version
- Fulfill documentation requirements stated in regulations such as ISO 9001, ISO 13485, GDPR etc.



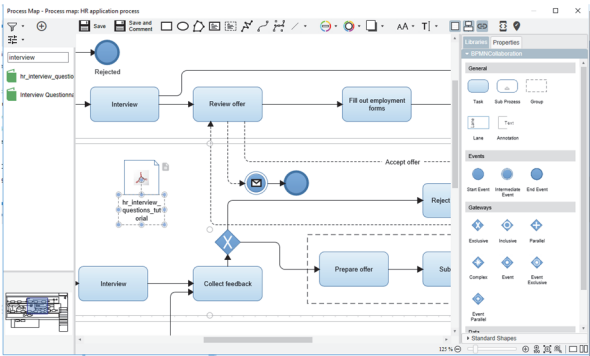
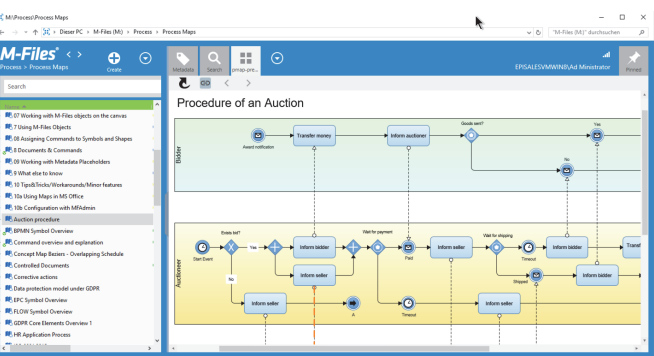
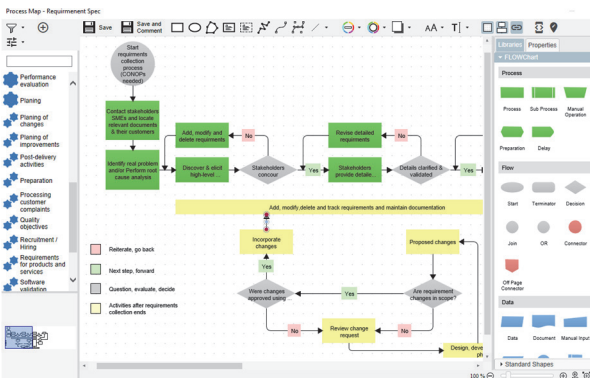
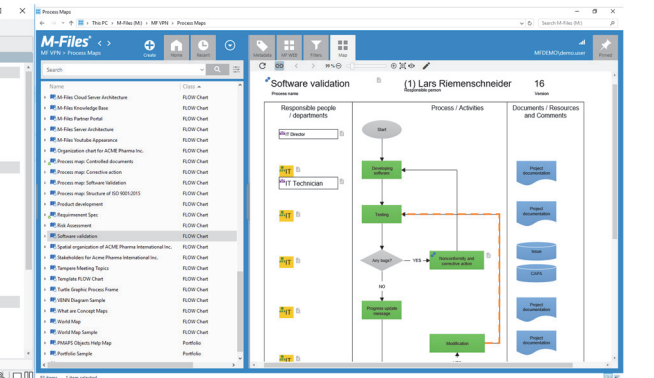
Home-Screen
Configuration with a
master map to navigate
into sub-maps in other
workflow notations.

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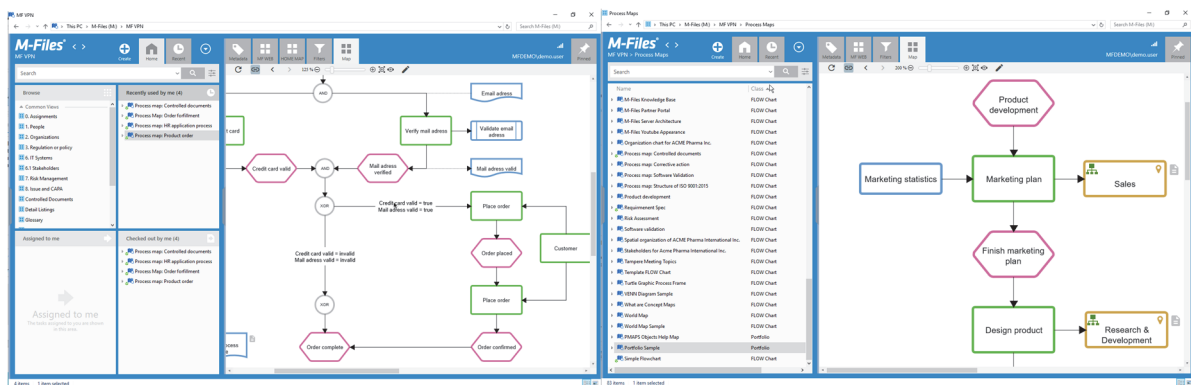
What type of diagrams can be created?

NOTATION	TYPICAL USE CASES	SMART SYMBOLS
BPMN 2.0 Collaboration Diagrams	<p>BPMN is a process notation used to model business and workflow processes alike. BPMN is maintained by OMG. M-Files Process Maps supports modeling of BPMN 2 collaboration diagrams. The BPMN collaboration diagram is used to model the interactions between participants, e.g. in a business-2-business (B2B) context. Participants are involved in the process and represented by means of pools and (swim) lanes. Interactions between these pools are represented by message flows (message exchanges).</p>	<p>Start-Events, End-Events, Intermediate Events, Gateways, Tasks (various types), Sub-Tasks, Pools, Swim lanes, Annotations, Various connectors to indicate message and interaction flows.</p>
		
Traditional Flowcharts	<p>Flowcharts are well known. They are easy to read and a good alternative to BPMN. They can be arranged in vertical or horizontal layout with or without swim lanes. The Toolset consists of four groups: Process Symbols, Flow-Symbols, Data-Symbols and Annotations.</p>	<p>Process Symbols: Start, End, Decision, AND, OR, JOIN, Connector-on-Page, Connector-off-page</p> <p>Flow Symbols: Process, Sub-Process, Manual Operation, Preparation, Delay</p> <p>Data Symbols: Data, Document, Manual Input, Stored Data, Sequential Data, Internal Storage, Database, Horizontal and Vertical Swim lanes.</p>
		
Event Driven Process Chains (EPC)	<p>Typically, a business process is a set of related tasks or activities performed to produce a product or service. A business process consists of events triggering activities. Rules control the flow of the process. Event Driven Process Chains describe</p>	<p>Events, Function/Activity, Input- and Output Data, Supporting Information such as IT-Systems, Documents, Risk, Controls and organizational Elements for Sites.</p>

- which activities are performed in the course of a process,
- which organizational units participate in process execution (persons, groups of persons),
- what input and output data are used,
- what IT-Systems are involved, and
- which events and risks occur during process execution.

Locations, Departments, Roles, Teams, Persons.

Events define the state or condition that causes an activity to start as well as the state that defines the completion of an activity. The start and end elements of a business process are always events. An event may be the source of several simultaneous activities. An activity may result in several events. To represent these branches and processing loops in a business process, a rule is used.



Process Landscape Diagram / Process Portfolio Diagrams

A process landscape is used to structure the process portfolio of an organization. Processes in a process portfolio can be connected in a sequence to describe an end-to-end scenario or a value chain. Processes can be arranged hierarchically to further refine certain process areas.

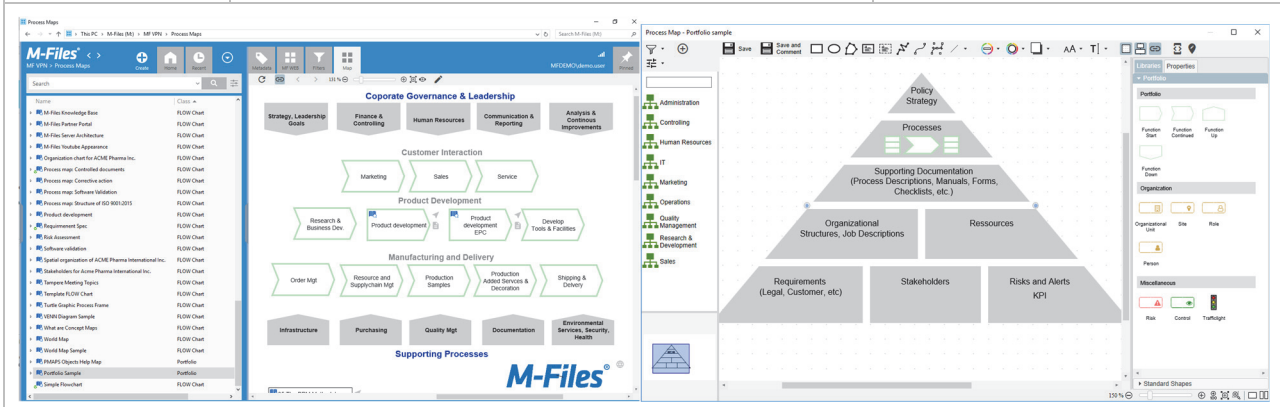
A process portfolio is usually structured into

- management processes (e.g. strategy)
- core processes (i.e. value-adding processes)
- support processes (e.g. marketing).

Various Arrows, Circles, Buttons, Import of Images, Rectangles, Ellipse, Polygons, Text objects, Call-Outs.

Value Chain Diagram (VCD)

Process landscapes are often used for the first two levels starting at the general high-level value chain with its governance and support processes.



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TECHNICAL NOTES AND REQUIREMENTS

- Compatible with M-Files 2015.3 and M-Files 2018
- M-Files Process Maps is based on M-Files best practices using HTML-5 Canvas technique in JavaScript, the M-Files Vault Application Framework and the M-Files UI Extension API for Windows and M-Files Web
- Can be used with any M-Files Vault: Map your vault objects to BPMN-, EPC or FLOW-symbols or use them for drawing free concept maps
- Created maps are regular M-Files Objects (permissions, versioning, workflows, replication, ...)
- Editing maps is possible using M-Files Desktop (currently online mode is supported only)
- Viewing and navigating using M-Files Desktop (offline mode is supported)
- Web access and mobile usage not supported.

FEATURE OVERVIEW

General ■ Add-On to put Information into context ■ visual easy to understand concept around processes, organizational structures or abstract concepts.

Technical Concept ■ M-Files vault application ■ client UI extension consisting of an editor for vector oriented smart drawing ■ interactive preview for navigation and consumption of linked web of maps.

Interactive Preview ■ Shows process maps ■ allows to navigate within a map ■ invoke commands
■ Zoom and jump to adjacent maps.

Drawing Elements: ■ Rectangles ■ Circles ■ Ellipses ■ Polygons ■ Lines ■ various Line styles ■ line caps and arrows ■ Fills with color, texture and gradients ■ Texts formatting Font, Size, Color ■ Word wrap and truncation.

Alignment and Layers ■ Automatic alignment through snap lines ■ Grid ■ Automatically offered connector ports ■ manual align (left, top, right, bottom) ■ Z-Order: top, bottom, up, down.

Nodes, Edges, Ports, Labels ■ All shapes and symbols (nodes) have 6 auto-connect ports for connection lines (edges) ■ Add text labels ■ Text

labels inside, outside and automatically aligned.

Accessing M-Files Content ■ Query M-Files for Objects, Tasks, Documents and Templates ■ Drag & Drop ■ Smart mapping to Symbols (e.g. department becomes a swim lane) ■ Prepopulate Labels and commands with M-Files objects ■ Access and assign custom properties tooltip values and commands.

Trigger, Command, Target Properties ■ Trigger: Click/Hover/DoubleClick, Shape or Icon ■ Target: Document Object, View, URL ■ Command: Show Metacard, Open, View, Edit, Create from Template, Launch URL, Navigate to, Launch View.

Navigation, Viewports, Anchors ■ Define default viewport (Preview zone) ■ Set anchors and target zone to invoke Navigation within one map.

BPMN Collaboration 2.0 ■ Start-Event ■ End-Event ■ Intermediate Event ■ Gateways (various types) ■ Tasks (various types) ■ Sub-Tasks ■ Pools, Swimlanes ■ Annotations ■ Various connectors to indicate message and interaction flows.

FLOW Charts ■ Start ■ End ■ Decision ■ AND ■ OR ■ JOIN ■ Connector on-Page ■ Connector-off-page ■ Process

Step ■ Sub-Process ■ Manual Operation ■ Preparation ■ Delay ■ Data Symbol ■ Document ■ Manual Input ■ Stored Data ■ Sequential Data ■ Internal Storage ■ Database ■ Horizontal and Vertical Swim lanes.

EPC Event driven Process Chains ■ Events ■ Function/Activity ■ Input- and Output Data ■ IT-System ■ Document ■ Risk ■ Site ■ Location ■ Department ■ Roles or Team ■ Person.

VCD Portfolio Value Chain Diagrams: Process Top (Guidance) ■ Process Start ■ Process Continue ■ Process End ■ Process bottom (supporting) ■ Images ■ Rectangles, Call-Outs, Shapes.

Import / Export / Re-Use of elements ■ PNG, JPEG, BMP images ■ SVG import through Drag&Drop ■ insert from Clipboard ■ SVG export for use in Windows Office 365.

Values & Placeholders ■ Use M-Files Metadata as text labels ■ Create HTML Tooltips with placeholder content ■ Dynamically color elements based on metadata evaluation ■ Show/Hide texts and images based on metadata.

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