INTEGRATING MICROSOFT TEAMS & M-FILES

In an era where a flexible, remote workplace may indeed become the norm, M-Files helps advance the investment companies have made in Microsoft Teams. In essence, M-Files breaks users from the chains of managing documents in a siloed manner. M-Files can be layered on individual applications to ensure that those applications adhere to overarching governance, compliance and security protocols. Intelligent information management with M-Files eliminates the need to micromanage individual applications, like Teams.

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01

Taming Information Sprawl

M-Files is built on a vision — to enable access to all the information in an organization, no matter where it's stored. The platform has integrations with most common third-party archives and business systems. Consequently, Teams users have access to information, files and documents in their channels and groups, regardless of which system they reside in. The best part for IT departments is that integrations within M-Files can be controlled at the company-level. Whereas, in Teams users are largely free to use any integration they see fit, giving rise to shadow IT and a variety of complications.

A huge part of creating this frictionless experience for employees — in Teams and otherwise — is the metadata-driven approach. M-Files ushers a new era of information management for users, uncoupling them from the traditional folder system of storing information — a setup that is still used by Microsoft Teams. With metadata properties, M-Files places a premium on what's in a document rather, than where it is stored. This changes the perspective completely.

Before M-Files, employees need to figure out where a document they might need was saved; now, it's enough to know what type of document they need, or which customer or project it concerns, or when it expires, and they can easily identify it. It's a way of looking at information that is much more in line with a modern workplace, where an employee can find needed information in context by commanding, "Show me all contracts that are expiring next week" or "I want to see all documents about this project." It's a paradigm shift that stands in stark contrast to the folder approach that comes from the archaic file cabinet system.

With M-Files for Microsoft Teams, there is one single source of truth for information. While M-Files tracks version history, there is only one master document which users can reference. Different departments can access the same up-to-date version of a document directly from Teams, no matter where it is stored and without the need to create duplicates

02

Easily managed, centralized document lifecycle

One of the most powerful features of M-Files is the ability to create workflows around documents. Workflows can move documents along their lifecycle — status changes automatically, and people are notified — even after the Teams channel is deleted or archived. Documents can be assigned to workflows, facilitating lifecycle management for different types of documents — like contracts, customer information, etc.

There's no need for manual processing of documents within Teams. Consider the example of a contract uploaded to a Teams channel with a note for team members to sign off on it. How can the originator know if all seven people have approved it? How does she know where it is in the approval process? With M-Files, documents like contracts follow a pre-defined workflow process, where users are reminded that action

is required, and managers are notified when the workflow is complete. Governing information becomes a snap when documents must be moved into different states depending on the type, so that appropriate lifecycle management can be enforced without impacting the day-to-day work of employees.

The same document lifecycle management in M-Files applies to the basic governance tenets of archival, disposition and retention. Sensitive information is protected even when external contributors are invited, and retention and disposition policies are enforced, no matter if a channel has been archived or deleted.

Workflow capabilities all but eliminate orphaned content. Documents, files and other information always have a by-line to owners, stakeholders, external contributors and anyone that might have a vested interest in the lifecycle of that document.

03

Minimize information security & compliance risk

With M-Files for Microsoft Teams, information security is safeguarded, and the risk of accidental leaks is minimized. M-Files features a robust and customizable structure for permissions and access. With metadata, users (or groups of users) can be assigned permissions automatically or manually, ensuring that they only have access to the documents they're supposed to have access to. Thus, even if an employee references sensitive files in a Teams channel, only those users with the appropriate permissions will be able to access them.

Imagine, for example, a situation where an employee shares confidential client data with team members on a Teams channel. Without M-Files, that employee may not know if some

members of the channel shouldn't have access to it. They may not know if that confidential information gets proliferated outside of the Teams environment. There's a lack of information security controls. With M-Files, the user simply shares a link to the document and only those with proper access can view or edit it.

In addition, accidental leaks are prevented at the system level. Both Microsoft Teams and M-Files use Azure Active Directory (AD) to authenticate and grant access to users. This allows setup of permissions to safeguard certain classes of documents. By using Azure AD to determine the role or the group of the user, it enables an advanced level of permissions within Teams, so that members of the same team or channel can have access to different sets of documents.

THE BACKBONE OF A FLEXIBLE, REMOTE WORKPLACE STRATEGY IS AN INTELLIGENT INFORMATION MANAGEMENT PLATFORM

Maintaining continuity through flexible work — and specifically working from home — has vaulted to enormous importance. Many pundits have lauded endpoint solutions like Microsoft Teams and, indeed, these are great solutions and should be praised for helping ease the burden of working remotely.

Ultimately, though, a poor implementation of these endpoint solutions only amounts to a quick fix. Sure, companies can crank up Teams pretty quickly, but what now? Companies need to beware that they aren't creating a short-term solution that leads to a long-term problem. If organizations are going to prepare for the new normal of flexible work environments, the solution is to develop a well-formed, overarching strategy — one that promotes a cohesive working environment while adhering to governance, compliance and security protocols.

It's a concept near and dear to our heart at M-Files. After all, our story is inextricably linked to the idea of a flexible work environment. The M-Files intelligent information management platform was built on the idea that the value of a piece of information is not where it's located, but what the file or document actually is. The byproduct is a strategy that incorporates anytime, anywhere access to information.

With an intelligent information management platform, the key principles that underpin a solid flexible work strategy are already there. All you have to do to work remotely is grab your laptop and go. All the information, files and documents they need are a couple clicks away, from any device. It's this concept of anytime, anywhere access to company information — with a built-in information security framework — that truly sets the stage for remote working, giving staffers the same experience as they would at the office.

And by doing that, companies can ensure continuity, productivity and efficiency of their remote workforce.

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