# Introduction to M-Files (M-Files for new-hires)

Login to the Workforce Alliance vault as an M-Files user. Username: Test user; password: Temp123!

Overview: M-Files is our digital file cabinet. It’s how we approve and store everything from timesheets to training fund requests.

## Navigation

Navigation buttons at the top; the four boxes in your home screen are also a good way to get a quick snapshot of what’s going on with your documents.

Click on a document

* Explain metadata card: the various ways the document can be stored and recalled.
* Preview tab
  + Multi-file documents vs. singles

Search & Filter results

* Search bar (use name & PID)
* Filter with the columns
* Filter with the options on the right (client, metadata, etc.)

## Loading a document

Emphasize that there are many different ways to accomplish the same thing in M-Files. People will show you different ways of doing stuff all the time; use what’s easiest or what makes sense for you.

* From Desktop (right click)
  + Handy for single documents that are saved as a PDF
  + Timesheets in particular are easy this way
  + Can load and send through a workflow without having to actually open M-Files
* Drag & drop
  + Handy when you’re adding files to a Multi-file document
* From inside a program
  + Handy if it doesn’t require a signature or if you need to keep working on it
* From a Template

Document Naming Conventions

* Extremely important for continuity so everyone knows what they’re looking at
* Generally, it’s first initial, Last Name, Participant ID, and the type of document (JDough 55555 Client Status Sheet)
  + No spaces in the customer’s name

## Creating a Client

When loading a document, you’ll always have to assign it to a customer. Be careful and make sure the customer hasn’t already been created. When typing in the customer’s name look to see if a matching name pops up. Customers should have their Part ID after their name if you find someone with the same name, but different Part ID, check KW to see if a duplicate account might have been created.

* Remember to include the Participant ID after the customer’s last name.

## Submitting Documents through Workflows

* Searchable workflows (just start typing what you’re looking for)
* You can’t change it once you’ve submitted it (If you do need a workflow changed, let me know and I’ll do it)
* Career Center should only use “Referral to Programs/Partner Referral Form” when submitting referrals. I know ‘Referral to Training” sounds right, but it’s got a different purpose.
* Timesheets, leave requests have specific workflows

## Assignments

* Viewable on home screen also in sidebar
  + Mention that M-Files usually sends an email about new assignments, but that shouldn’t be relied upon. Check your box/view at least twice a week
* Making Corrections
  + Check out & open
  + Make corrections & check back in
  + Change the state in metadata or sidebar
  + Check the signature manifest to ensure that it’s reassigned correctly
  + Any problems let me or Denise know

## Setting up a Digital Signature

### In Adobe:

Open a PDF in Adobe Acrobat Reader DC

Click on Tools, then Certificates. On the Certificates tool bar choose “Digitally Sign”

Choose “Adobe Default Security” as the method, click OK

Draw a box where you want to sign.

In the dialog box, choose “Configure a New Digital ID,” the choose “Create a new Digital ID” and click continue

I always choose “Save to file” that way I know where it is; click continue

Enter your name, the Organization Name and email address. You can leave everything else alone; click Continue.

Choose where you want to save your Digital ID, you can leave it as the default or click “Browse” to choose a different place.

Enter the password you’d like to use. You’ll have to enter this every time you digitally sign a document. Re-enter the password and click save.

### In Fox It

Open a PDF in Foxit PhantomPDF

Click on the “Protect” Tab and choose “Digital IDs”

In the dialogue box, choose “Add ID” (top right corner of the box)

Choose the bubble next to “A new digital ID I want to create now;” click next

Choose “New PKCS#12 digital ID file” click next

Enter your name, the Organization name and your email address. You can leave everything else alone; click next.

Choose where you want to save your Digital ID, you can leave it as the default or click “Browse” to choose a different place.

Enter the password you’d like to use. You’ll have to enter this every time you digitally sign a document. Re-enter the password and click finish.