



DYNAMIC CONTRACT LIFECYCLE MANAGEMENT

Did you know that...



Users waste 30 minutes a day -- or 16 days each year -- searching for documents

(Source: Harmon.ie)



60 % outdated
50 % duplicated

Jyväskylän yliopisto



70 % of documents are reproduced

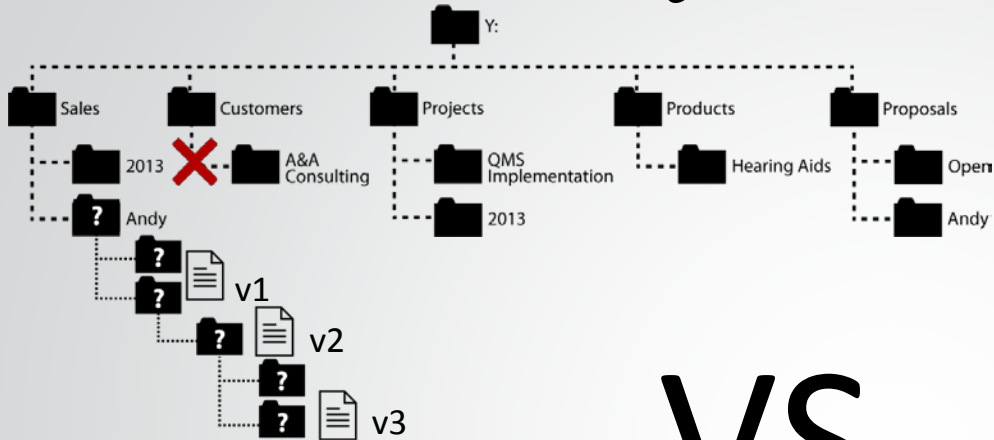
International Data Corporation (IDC) & Document Management Alliance (DMA)



19 copies per document is an average

International Data Corporation (IDC) & Document Management Alliance (DMA)

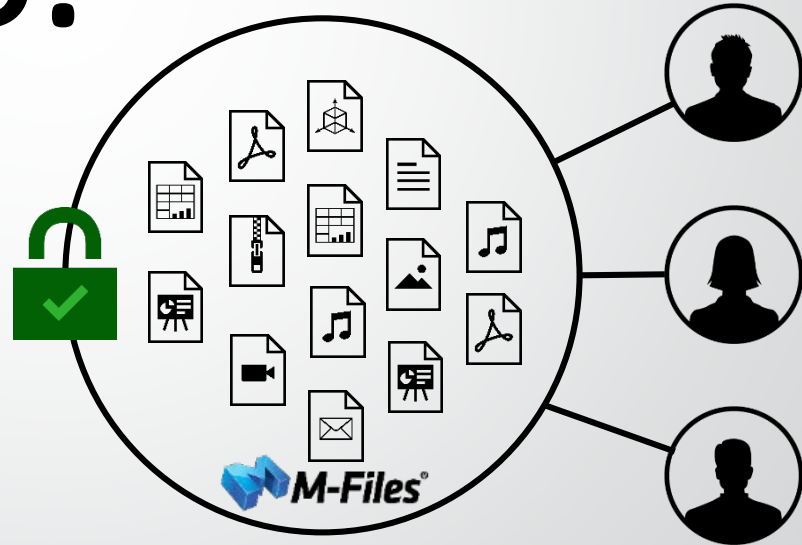
Dynamic Content Management



VS.

M-Files Key Benefits

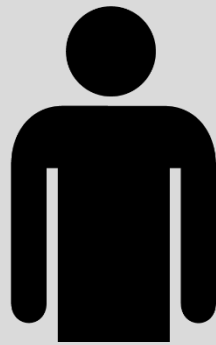
- ★ Centralized repository
- ★ Enhanced Security
- ★ Instant find of information
- ★ Automated version control



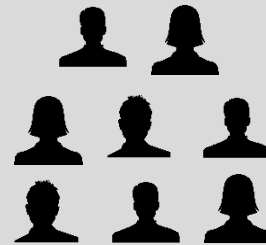
Lifecycle of the document



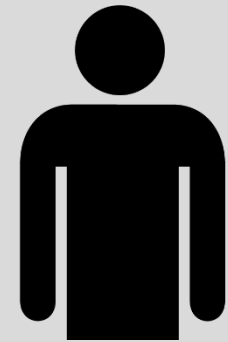
Create



Approve

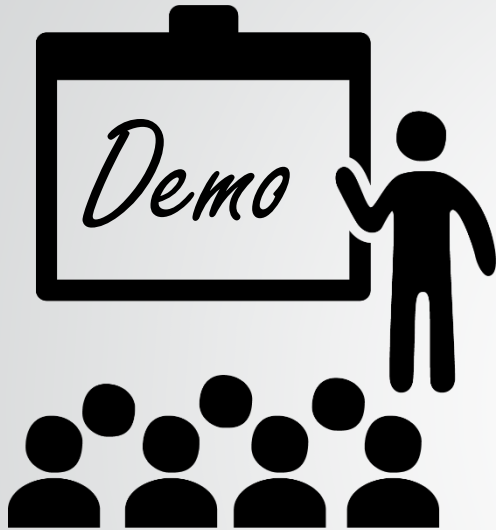


Publish
Use



Archive





- ★ How to create new contract
- ★ Templates and Workflows
- ★ Notifications
- ★ Outlook integration
- ★ Scanning

CONTRACT LIFECYCLE MANAGEMENT

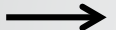


Contract Lifecycle Process

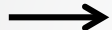
Pre-signing



Draft



Internal review



Customer approval



Signing



Valid Contract



Archiving

Post-signing



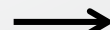
Signing



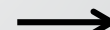
Valid Contract



e Archiving
(scanning)



Alarms

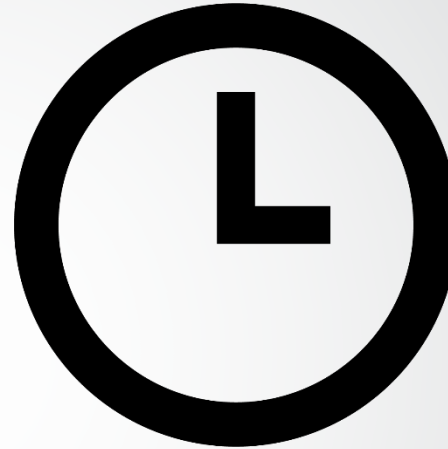


Renewal

Challenges

Pre-Signing:

- ★ Preparation is laborious
- ★ Approving is time-consuming
- ★ Incomplete archiving



Post-Signing:

- ★ Difficult to find
- ★ Managing the user right
- ★ Following the liabilities is difficult

Contract Lifecycle with M-Files



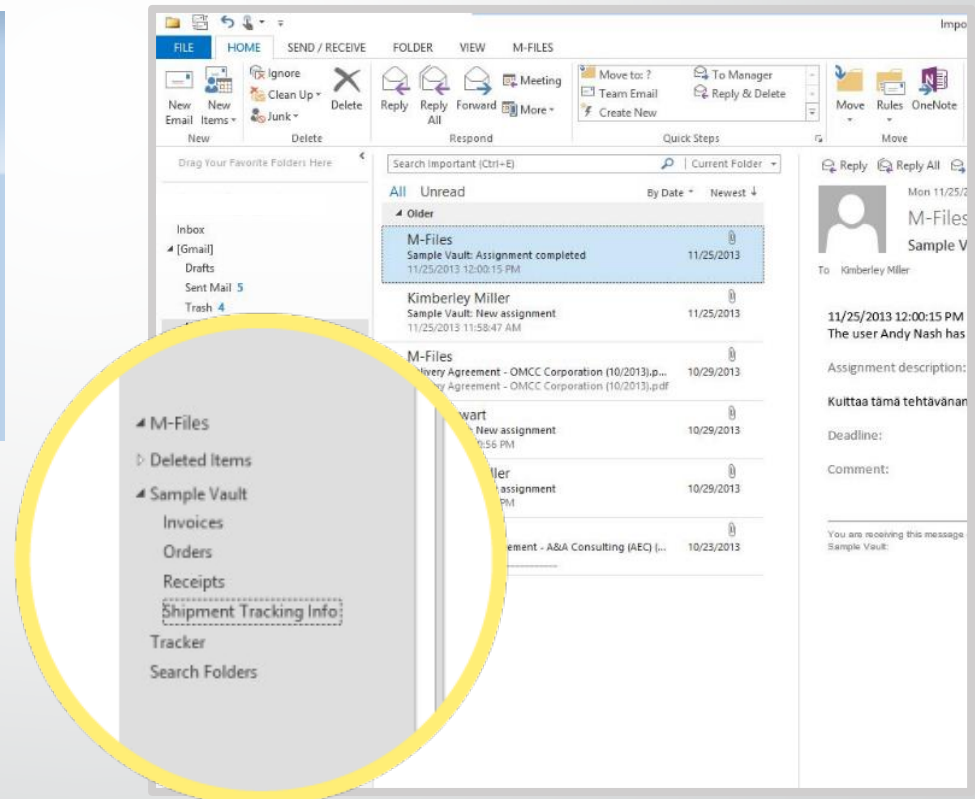
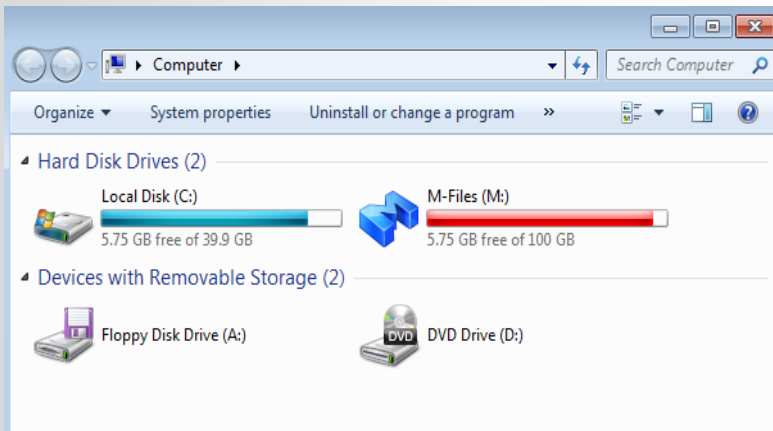
★ M-Files is integrated to Windows



Saving is easy




Directly from Outlook



Creating based on templates

- ★ Uniform appearance
- ★ Juridical validity
- ★ Automated properties



ESTT-yhtiöt (IT)
Saara Virtanen
Tulliportinkatu 24
33542 Turku

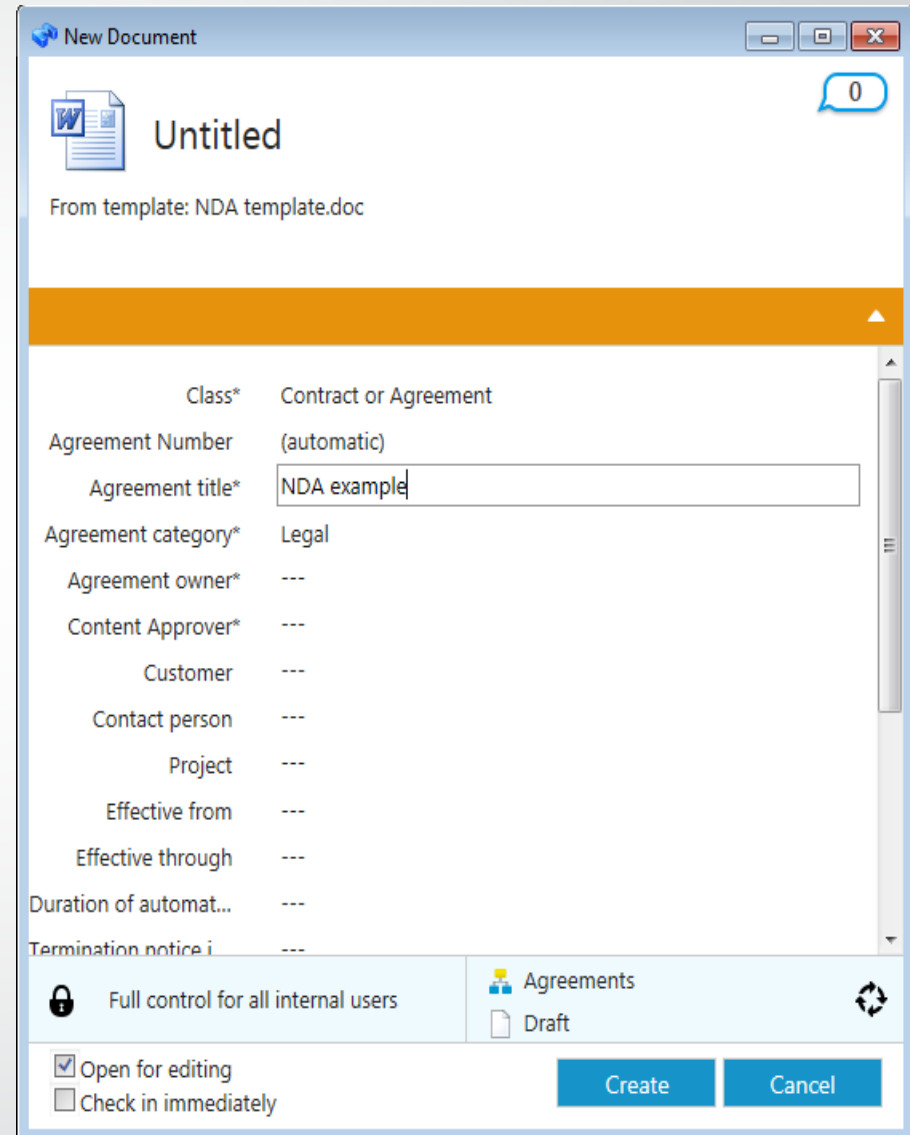
SOPIMUS

Päiväys: **25.8.2011**
Sopimusnumero: **118**
Asiakas: **ESTT-yhtiöt (IT)**

Donec libero sapien, pulvinar a, varius commodo, lacinia et, nisl. Fusce congue, lectus non bibendum elementum, libero velit laoreet nibh, sit amet porttitor enim nulla in lacus.

Metadata structure

- ★ Classification is very easy
 - Predefined metadata structure available out of the box
 - Easy customization based on your needs



New Document

Untitled

From template: NDA template.doc

Class*	Contract or Agreement
Agreement Number	(automatic)
Agreement title*	NDA example
Agreement category*	Legal
Agreement owner*	---
Content Approver*	---
Customer	---
Contact person	---
Project	---
Effective from	---
Effective through	---
Duration of automat...	---
Termination notice i	---

Full control for all internal users

Agreements

Draft

Open for editing

Check in immediately

Create Cancel




















Clear visibility to contract library

★ Dynamic views give you an instant visibility to contracts

- Permanent awareness
- Essential contract information immediately visible
- Preview the contract without opening the contract

M-Files CLM

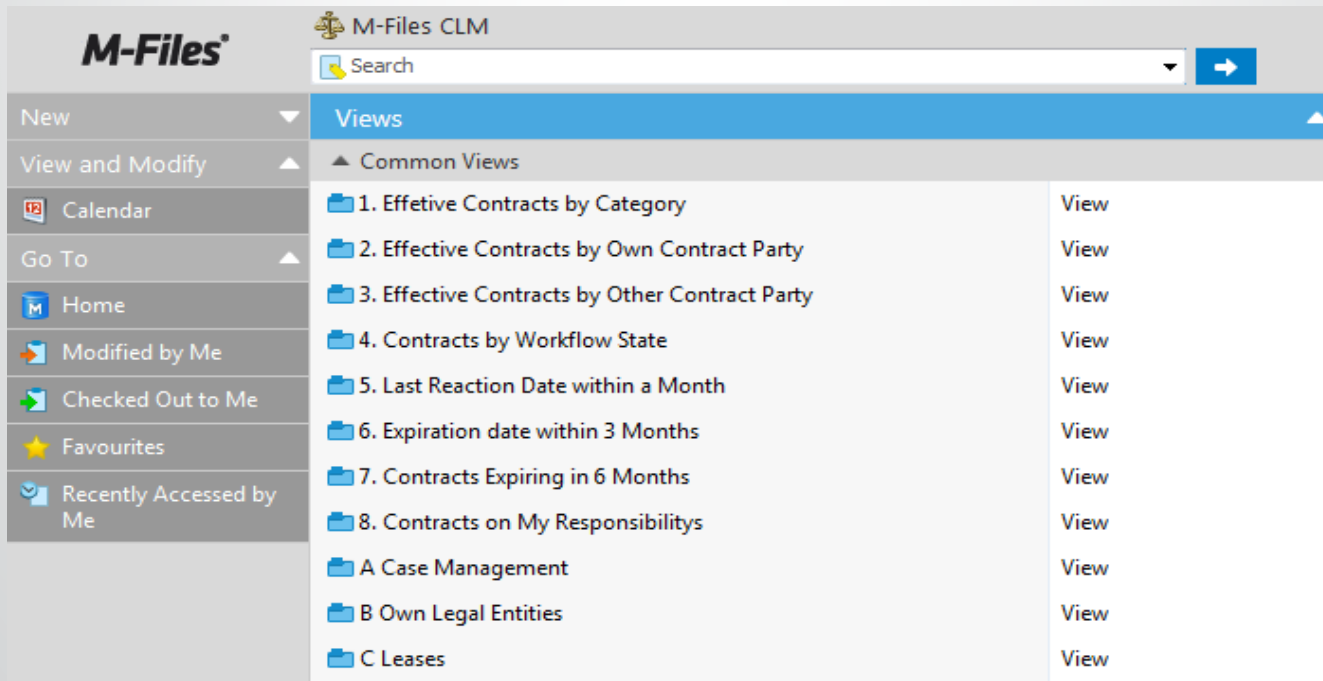
Search

Name ▲	Date Modified	State	Own Contract Party	Other Contract Party
▲ Documents (12)				
 Delivery Agreement Template.docx	3/21/2014 6:18 AM	-		
>  MF000013 - Delivery Agreement - S&C Enterpris...	3/19/2014 9:19 AM	 Draft	M-Files Oy	S&C Enterprises
>  MF000015 - Delivery Agreement - ESTT Corpora...	3/19/2014 9:19 AM	 Draft	M-Files Oy	ESTT Corporation (IT)
>  MF000016 - Office Lease Tampere - OMCC Cor...	3/13/2014 7:14 AM	 Effective	M-Files Oy	OMCC Corporation
>  MF000017 - Delivery Agreement - OMCC Corpo...	3/19/2014 9:19 AM	 Expired	M-Files Oy	OMCC Corporation
>  MF000018 - Delivery Agreement - S&C Enterpris...	3/19/2014 9:19 AM	 Effective	M-Files Oy	S&C Enterprises
>  MF000019 - Contract on HR Services - Reese, M...	3/19/2014 9:19 AM	 Draft	M-Files Oy	Reese, Murphy and Part...
>  MF000020 - NDA - A&A Consulting (ARK/RAK)....	3/19/2014 9:19 AM	 Draft	M-Files Oy	A&A Consulting (ARK/...
>  MF000021 - NDA - Red Line Group.doc	3/19/2014 9:19 AM	 Effective	M-Files Oy	Red Line Group
>  MF000022 - Delivery Agreement - OMCC Corpo...	3/19/2014 9:19 AM	 Expired	M-Files Inc.	OMCC Corporation



Search and you'll find it

- ★ Easy to use and easy to find
- ★ Searching also based on the content



The screenshot shows the M-Files CLM interface. At the top left is the M-Files logo. To its right is the text "M-Files CLM" and a search bar containing the word "Search" with a search icon and a right-pointing arrow button. Below the search bar is a navigation menu with the following items: "New", "View and Modify", "Calendar", "Go To", "Home", "Modified by Me", "Checked Out to Me", "Favourites", and "Recently Accessed by Me". The "Views" section is expanded, showing a list of views with a "View" button next to each:

View Name	Action
1. Effective Contracts by Category	View
2. Effective Contracts by Own Contract Party	View
3. Effective Contracts by Other Contract Party	View
4. Contracts by Workflow State	View
5. Last Reaction Date within a Month	View
6. Expiration date within 3 Months	View
7. Contracts Expiring in 6 Months	View
8. Contracts on My Responsibility	View
A Case Management	View
B Own Legal Entities	View
C Leases	View



It's secure

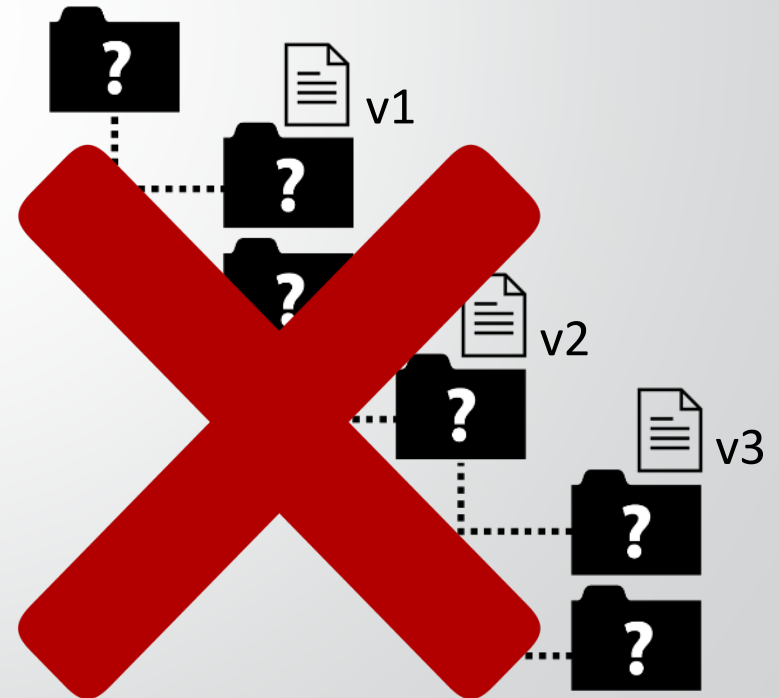
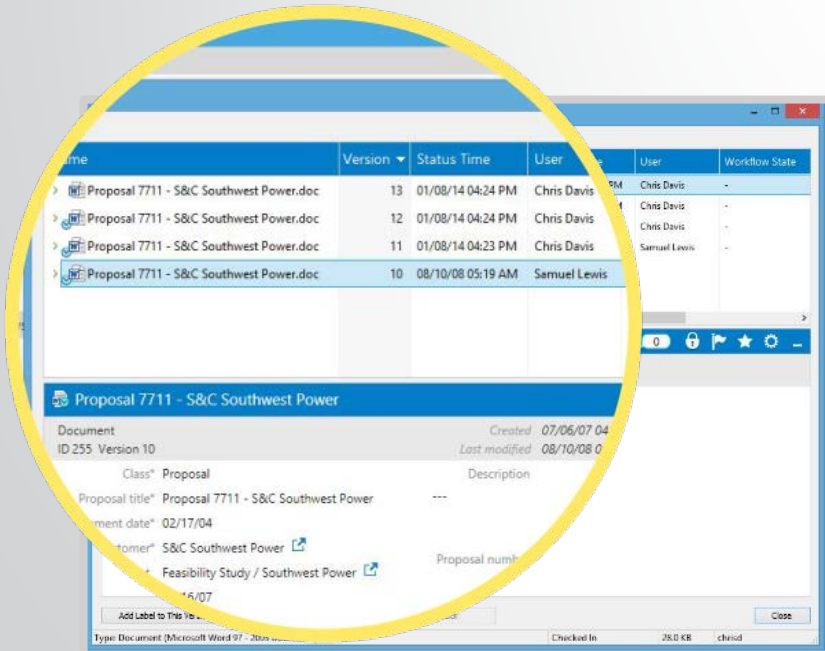
★ Access to the contracts is always based on permissions

- Permissions are per contract
- Different permission levels: read only and modify
- Permissions can be set automatically based on the metadata



Version control is quality

- ★ Changes are recorded automatically
- ★ Full audit trail available
- ★ Rollback to previous is possible



Instant notification of expired contracts

- ★ Alarms and notifications are based on the metadata
- ★ Time intervals freely configurable



M-Files M-Files CLM

Search

New

View and Modify

Calendar

Go To

Home

Modified by Me

Checked Out to Me

Favourites

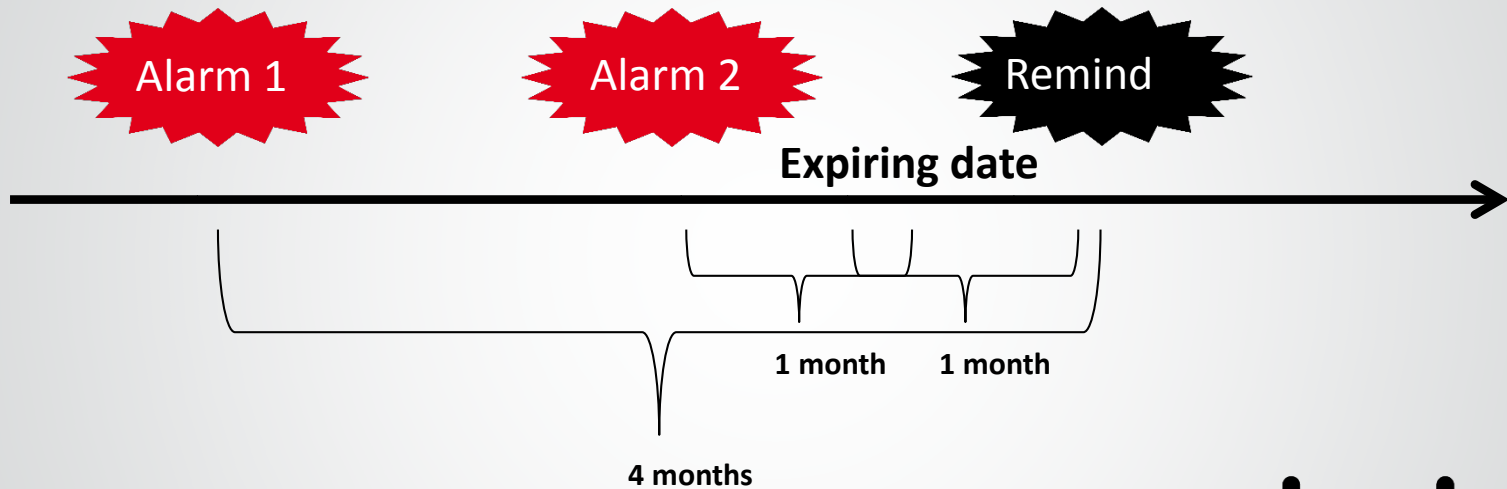
Recently Accessed by Me

Views

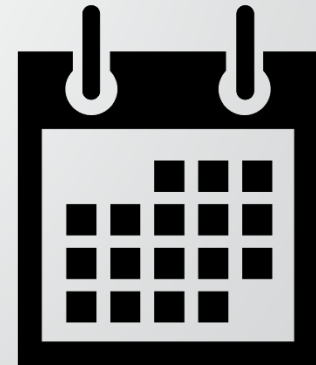
Common Views

1. Effetive Contracts by Category	View
2. Effective Contracts by Own Contract Party	View
3. Effective Contracts by Other Contract Party	View
4. Contracts by Workflow State	View
5. Last Reaction Date within a Month	View
6. Expiration date within 3 Months	View
7. Contracts Expiring in 6 Months	View
8. Contracts on My Responsibility	View
A Case Management	View
B Own Legal Entities	View
C Leases	View

Be on top of milestones



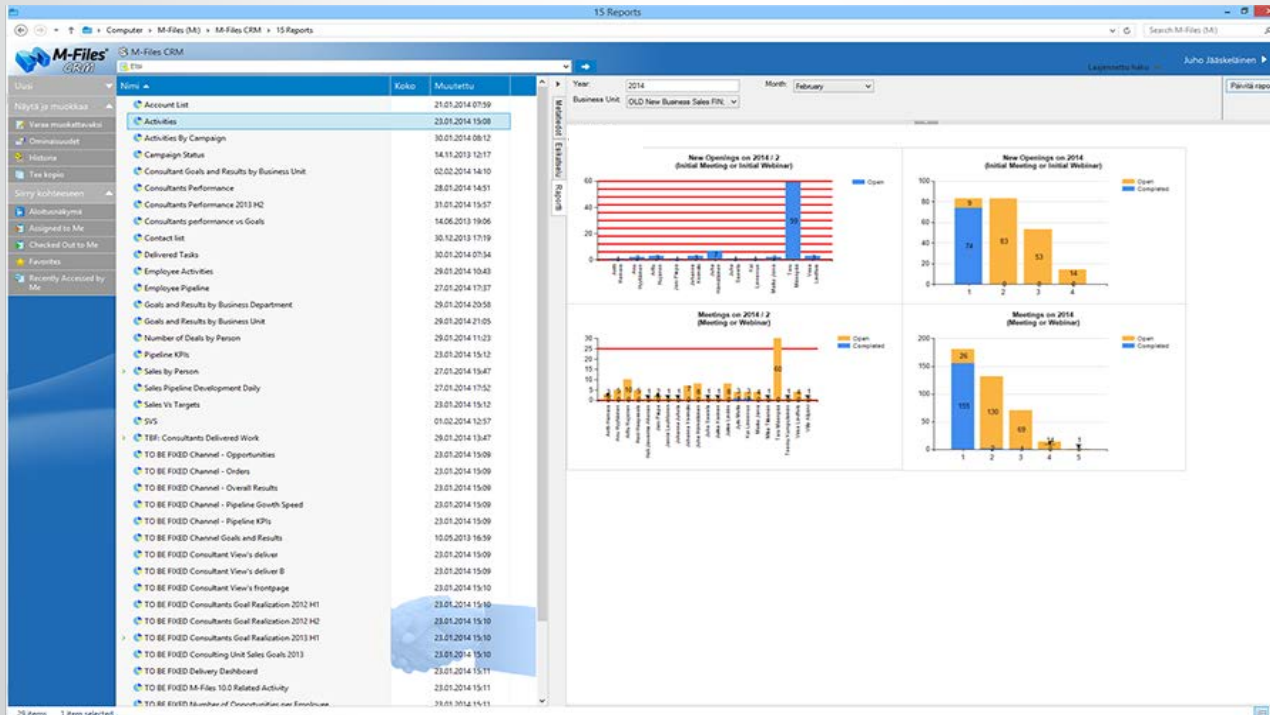
- ★ Automated notification when contract is about to expire
- ★ Notification content freely configurable



Visualize with M-Files Reporting



- ★ Gives an instant view of the contract base
- ★ Optional feature and requires MS SQL Server





let's
STAY IN TOUCH.
YOU CAN FIND US
————— *here* —————>

solutionmanagement.eu/m-files



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