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M-Files Metadata DMS Training

2 days (14 hours)

Presentation

M-Files is an intelligent, metadata-based document management solution. Unlike traditional file systems, M-Files allows you to classify, search and automate documents based on what they are, rather than where they are.

Our M-Files Metadata DMS training course will enable you to get to grips with the metadata-driven document structure, connect your front or back-end applications to M-Files via its API, and trigger automated workflows in your business tools.

You'll be able to create dynamic views, structure a business-oriented document repository, and integrate M-Files functionalities (upload, validation, search) directly into a web application (React, Node.js or other). You'll also learn how to secure access via metadata and use connectors to Microsoft 365, Salesforce or Teams.

At the end of this course, you'll know how to create interfaces for your apps with M-Files, automate document processing and build intelligent web interfaces connected to your EDM.

As with all our training courses, this one is based on the [latest stable version of M-Files](#).

Objectives

- Understand the principles of metadata-driven EDM with M-Files
- Model a document repository (classes, properties, dynamic views)
- Use the M-Files REST API to search, create and modify documents
- Integrate M-Files into a web application via API calls (React, Node, etc.)
- Trigger and monitor document validation workflows
- Secure access via metadata-based permissions
- Create a web dashboard connected to M-Files

Target audience

- Full-stack developers
- Front-end developers
- Digital transformation managers

Prerequisites

- Basic knowledge of web development
- Mastery of a development environment
- Knowledge of HTTP, JSON and API calls
- No prior knowledge of M-Files required

M-Files Metadata DMS training program

Understanding the fundamentals of M-Files and modern DMS

- Introduction to document management and DMS issues
- Presentation of M-Files: philosophy, architecture, use cases
- Key concepts: vault, metadata, classes, objects, dynamic views
- The metadata-driven approach vs. traditional folder structure
- Intelligent search and automatic versioning
- User environment overview (Desktop, Web, Mobile)

Structuring information with M-Files

- Modeling a metadata schema (classes, properties, objects)
- Creating and configuring custom document classes
- Setting up dynamic views based on metadata
- Access control: static and dynamic rights
- Versioning, confidentiality and retention logic
- Best practices in document structuring
- Workshop: Creating a business document model with classes, metadata and custom views

Exploiting the M-Files REST API

- REST API overview: architecture and endpoints
- Authentication (Basic Auth, token, session)
- Fundamental requests: GET / POST / PUT / DELETE
- Document retrieval and filtering by metadata
- Updating properties and uploading files
- Security and error handling in API calls
- Workshop: Using the M-Files API from a web application to list and create documents with metadata

Integrating M-Files into a web application

- Front-end integration: UX design around documents
- Forms for creating/uploading documents with metadata
- Dynamic display of results (tables, filters)
- Integration via fetch, Axios or REST libraries
- Permission management in the external application
- Best practices for avoiding duplication and conflicts

Automating business processes with workflows

- Creating and configuring workflows in M-Files
- Automatic states, transitions and triggers
- Notifications, tasks and dynamic assignment
- Triggering actions via events (webhook, script)
- Track the progress and status of a document in a workflow
- Interconnection with external tools (Slack, Teams, Zapier)

Security, deployment and synthesis project

- Advanced metadata-based permissions management
- Deployment modes: Cloud, On-Premise, Hybrid
- Connectors (Microsoft 365, Salesforce, SharePoint, ERP)
- APIs and advanced customization (extensibility, integrations)
- Certification, official resources, M-Files Academy
- Workshop: Create a mini-web application to consult, create, classify and validate documents via the M-Files API

Companies concerned

This course is aimed at both individuals and companies, large or small, wishing to train their teams in a new, advanced computer technology, or to acquire specific business knowledge or modern methods.

Positioning at training start

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level on different types of technology, as well as his or her expectations and personal objectives with regard to the training to come, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

Teaching methods

Practical training: 60% hands-on, 40% theory. Training material distributed in digital format

to all participants.

Organization

The course alternates theoretical input from the trainer, supported by examples, with brainstorming sessions and group work.

Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

Certification

A certificate will be awarded to each trainee who has completed the entire course.