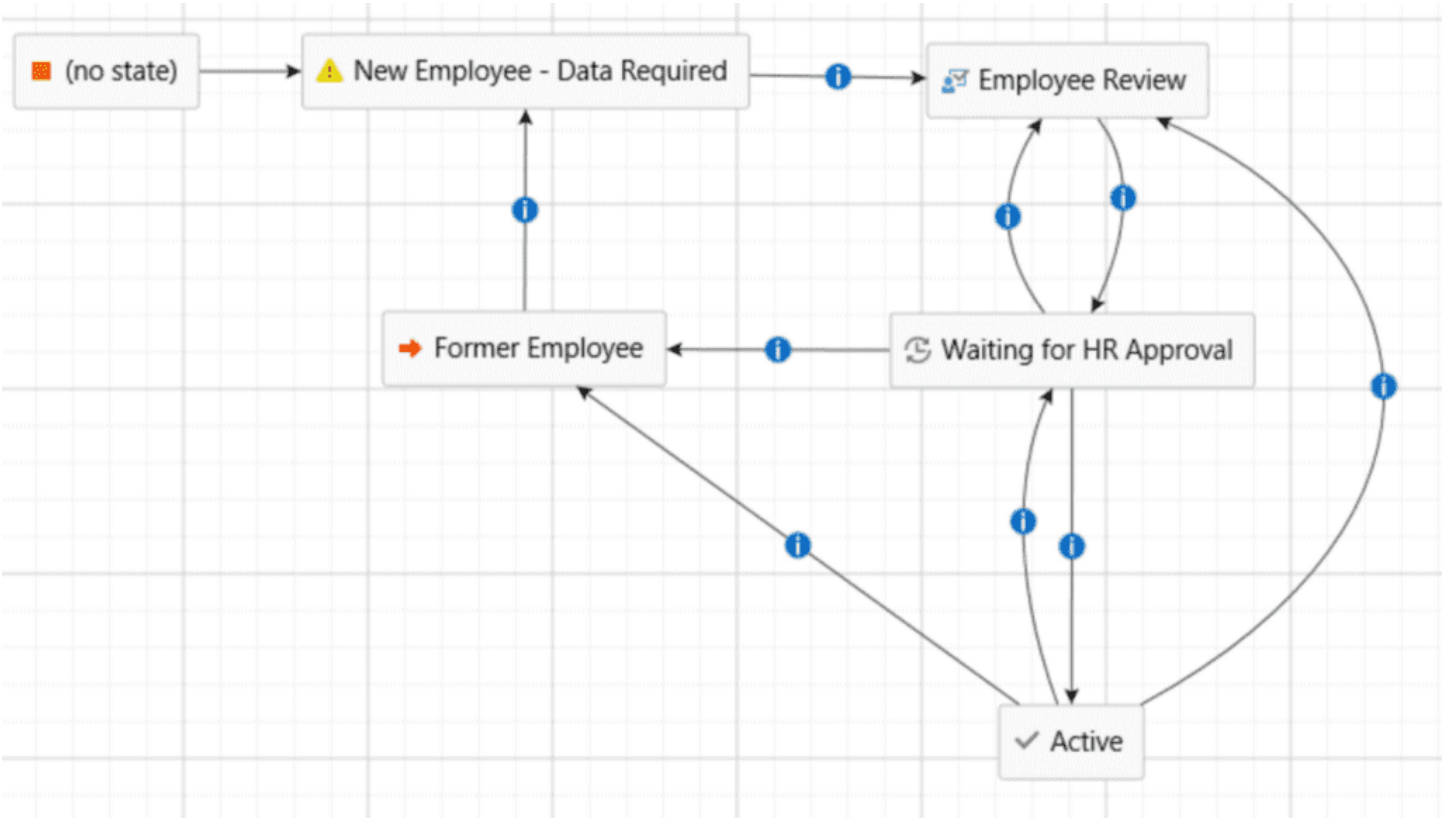
Use Cases

Object Operations · https://extensionkit.unitfly.com/documentation/object-operations-use-cases/

Create Agreements (NDA), Statements, when person is hired

Customer is large IT company and they are using M-Files HR solution. When their candidate is hired, entered the Active state Picture 1, M-Files automatically creates NDA and Statement.



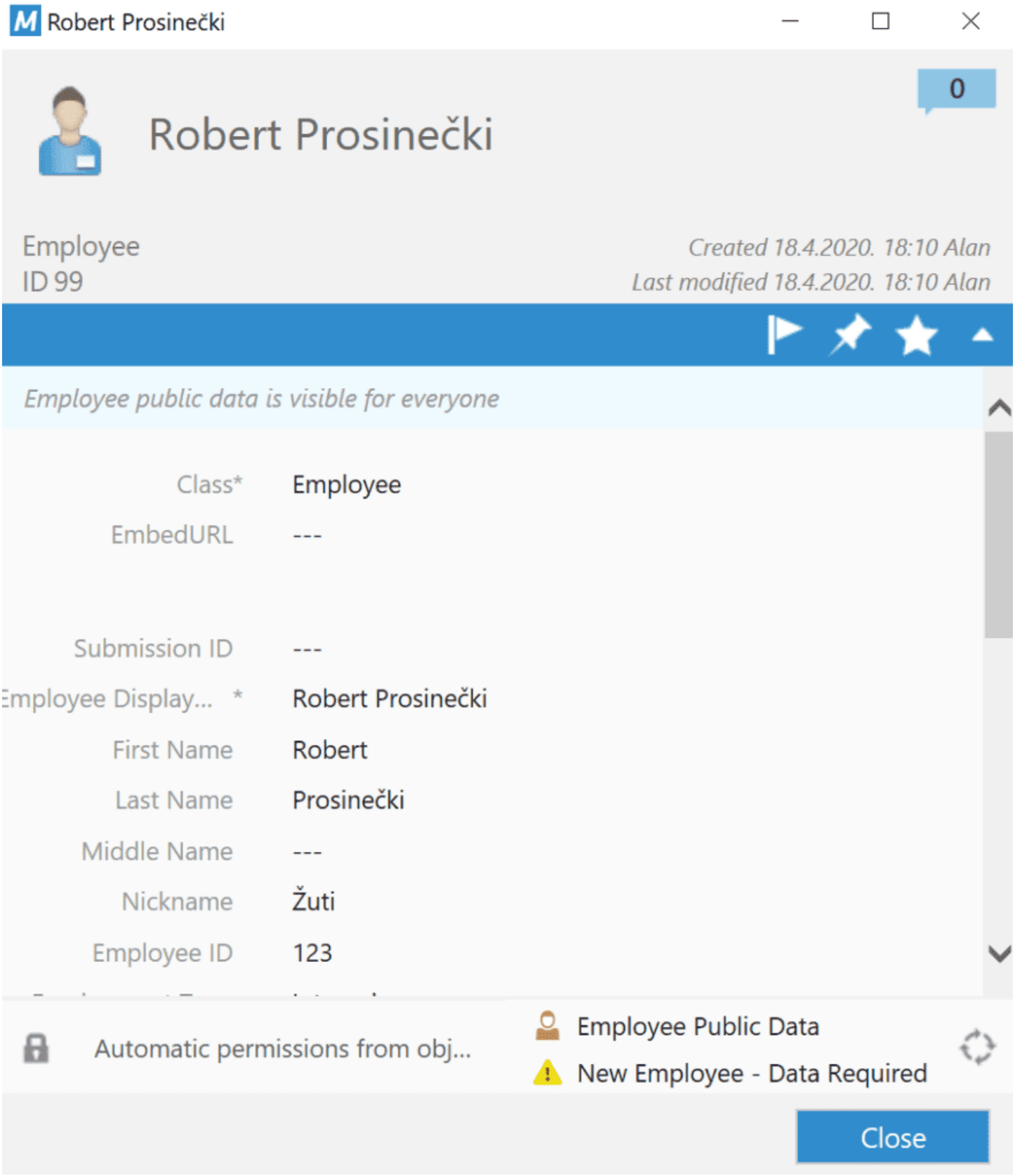
Picture 1. Employee Workflow

For each document they have defined templates in M-Files, Picture 2.



Picture 2. Templates in M-Files

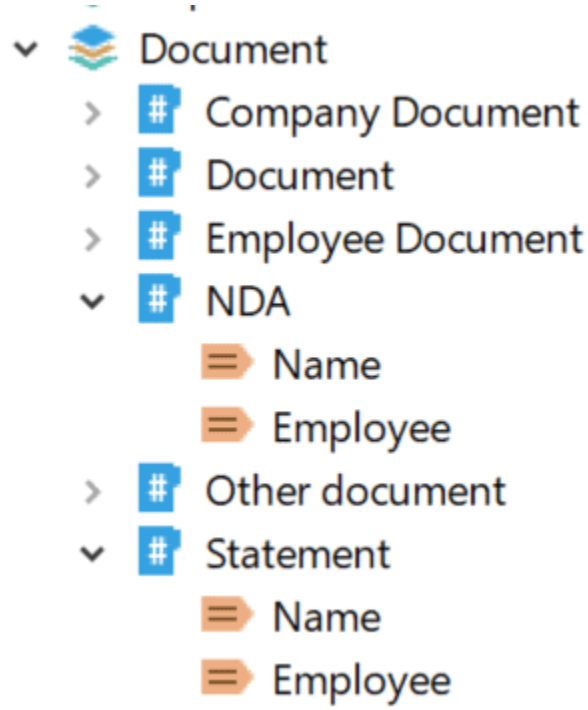
Employee object is created (Picture 3) and when it goes through workflow. When its entered Active state, two new documents will be created.



Picture 3. Employee object in M-Files

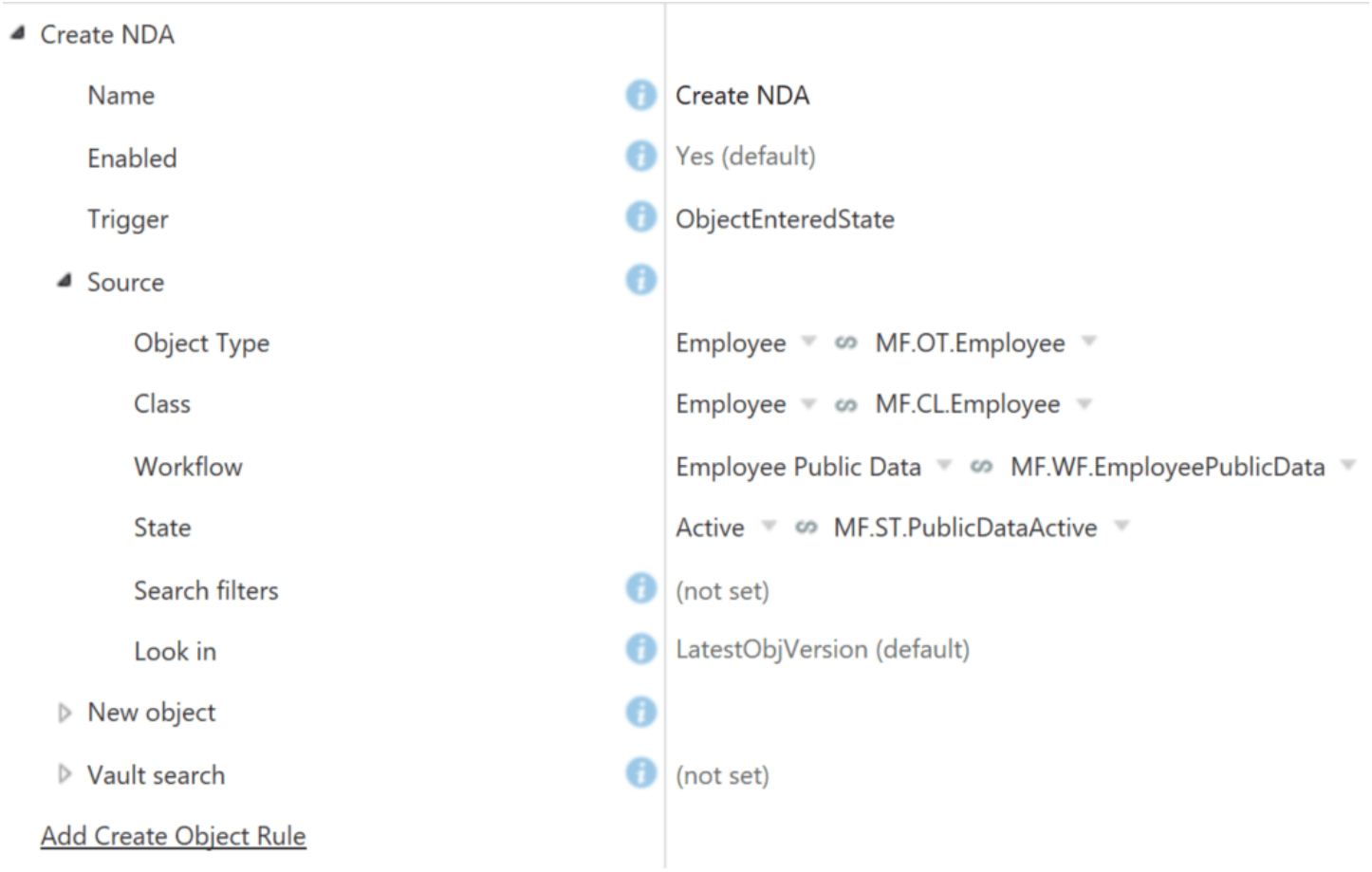
Configuration of Object creation

Source object that trigger creation of NDA and Statement is Employee. Both objects will be created from templates and required properties is Employee, Picture 4.

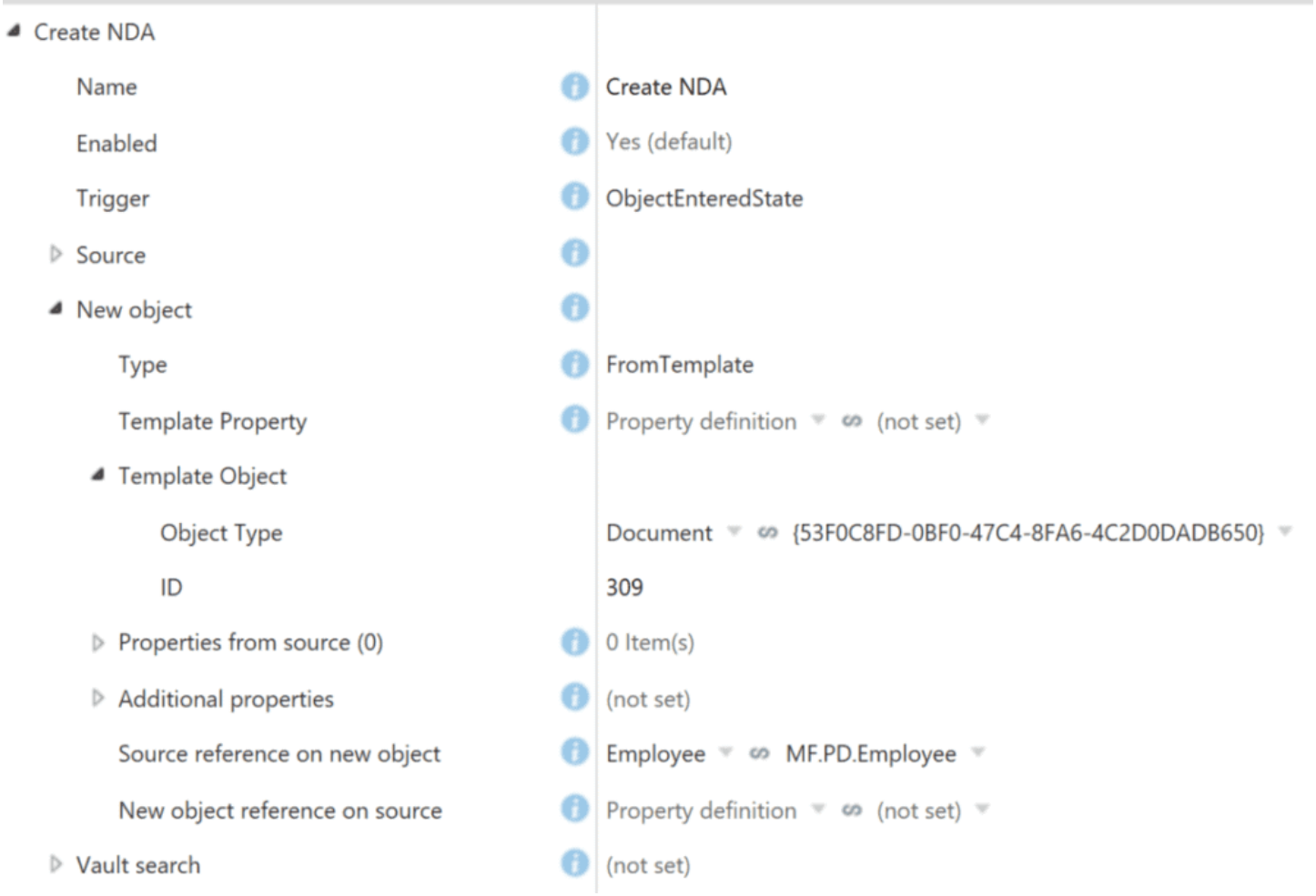


Picture 4. Structure of NDA and Statement

Documents Names are automatically calculated of Class and Employee, so we will need to add set Employee property.



Picture 5. Configuration – Source object



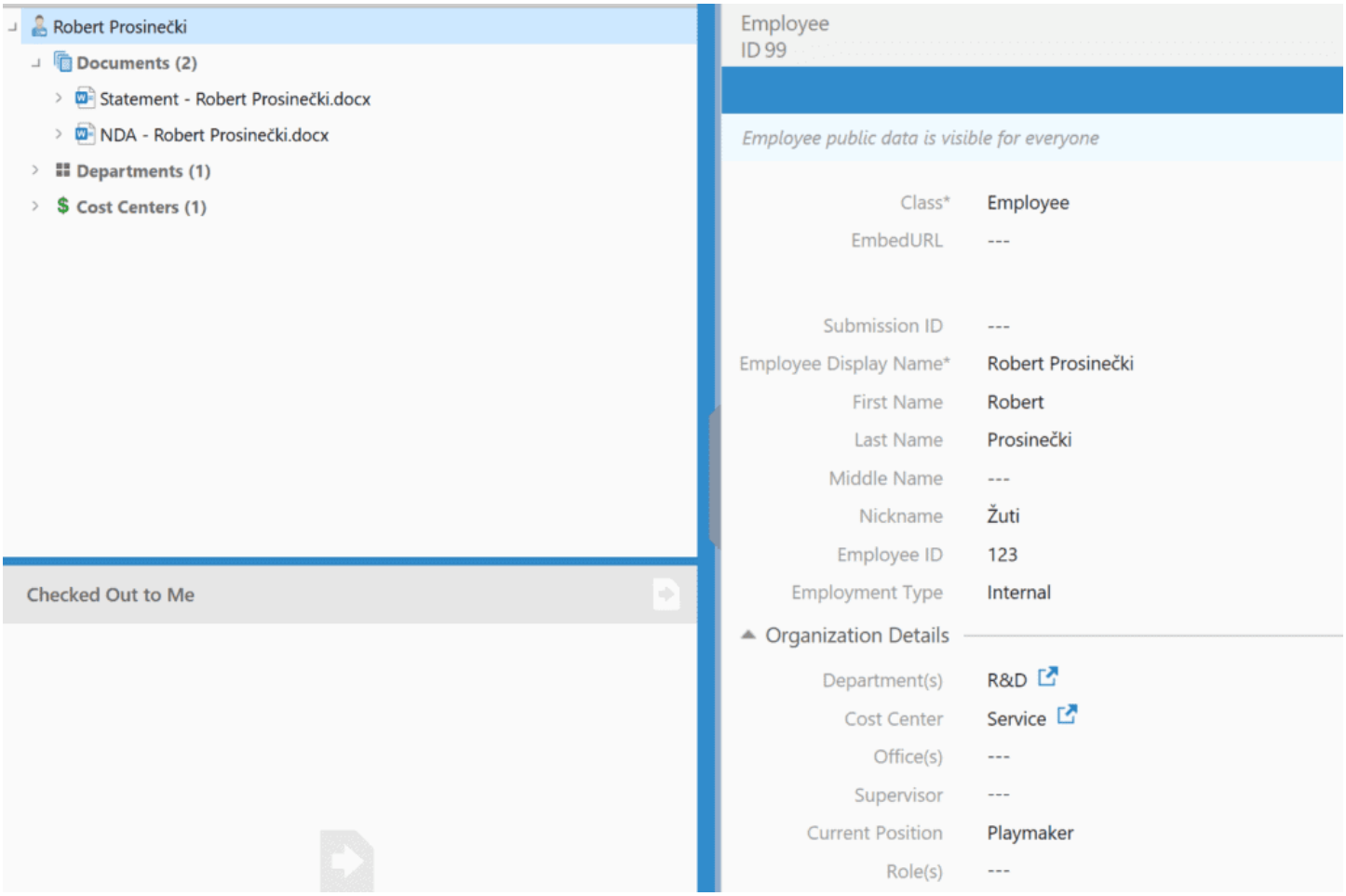
Picture 6. Configuration – New Object

On a statement, we would like to add Current position, so configuration is like on Picture 7.



Picture 7. Configuration – Statement

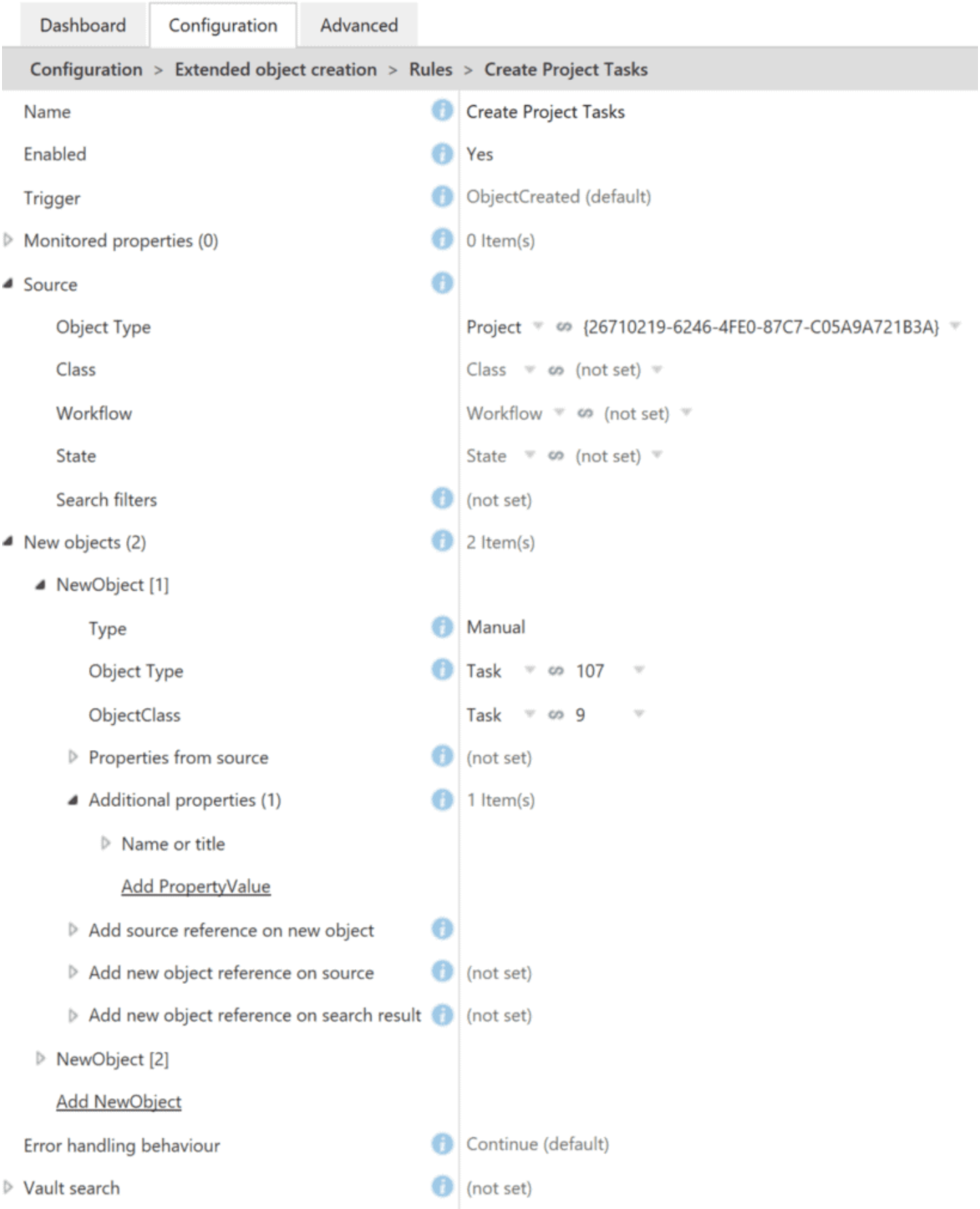
Now when Employee is in active state, two documents are created, Picture 8.



Picture 8. Employee with two new documents

Create Tasks when a project is created

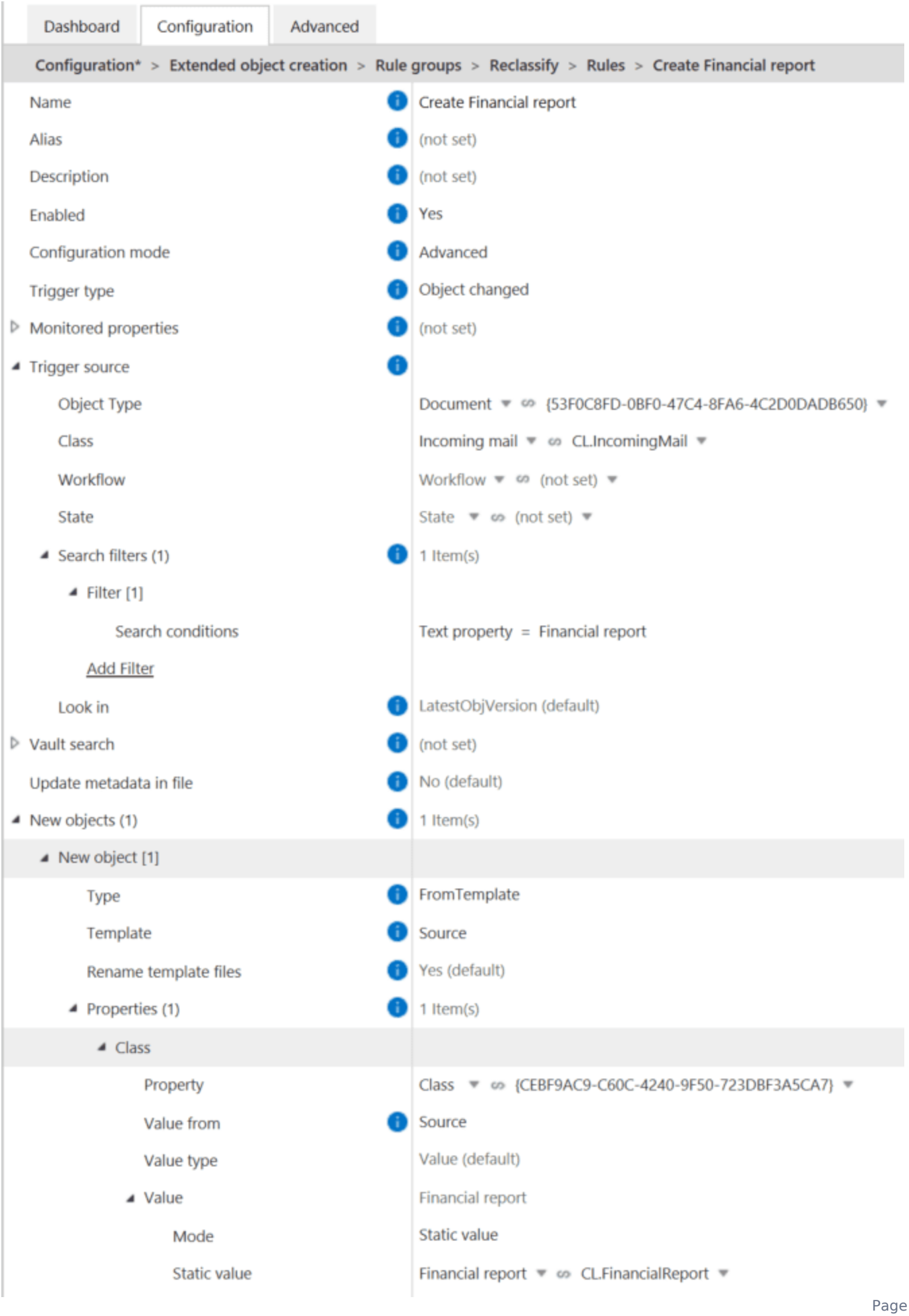
Customer is using M-Files for Project Management. When Project is created, few specific tasks are created to project manager.


Dashboard
Configuration
Advanced
Configuration > Extended object creation > Rules > Create Project Tasks
Name
Create Project Tasks
Enabled
Yes
Trigger
ObjectCreated (default)
Monitored properties (0)
0 Item(s)
Source
Object Type
Project {26710219-6246-4FE0-87C7-C05A9A721B3A}
Class
Class (not set)
Workflow
Workflow (not set)
State
State (not set)
Search filters
(not set)
New objects (2)
2 Item(s)
NewObject [1]
Type
Manual
Object Type
Task 107
ObjectClass
Task 9
Properties from source
(not set)
Additional properties (1)
1 Item(s)
Name or title
Add PropertyValue
Add source reference on new object
Add new object reference on source
(not set)
Add new object reference on search result
(not set)
NewObject [2]
Add NewObject
Error handling behaviour
Continue (default)
Vault search
(not set)

Picture 9. Configuration – Project and Tasks

Creating copy of object and properties in new class and making copies of attachments and editing references on both ends.

Source object that triggers the creation of Financial report is Incoming mail, which *Text property* has value “Financial report”. New object will be created from template (source object), Picture 10.


Dashboard
Configuration
Advanced
Configuration* > Extended object creation > Rule groups > Reclassify > Rules > Create Financial report
Name
Create Financial report
Alias
(not set)
Description
(not set)
Enabled
Yes
Configuration mode
Advanced
Trigger type
Object changed
Monitored properties
(not set)
Trigger source
Object Type
Document {53F0C8FD-0BF0-47C4-8FA6-4C2D0DADB650}
Class
Incoming mail CL.IncomingMail
Workflow
Workflow (not set)
State
State (not set)
Search filters (1)
1 Item(s)
Filter [1]
Search conditions
Text property = Financial report
Add Filter
Look in
LatestObjVersion (default)
Vault search
(not set)
Update metadata in file
No (default)
New objects (1)
1 Item(s)
New object [1]
Type
FromTemplate
Template
Source
Rename template files
Yes (default)
Properties (1)
1 Item(s)
Class
Property
Class {CEBF9AC9-C60C-4240-9F50-723DBF3A5CA7}
Value from
Source
Value type
Value (default)
Value
Financial report
Mode
Static value
Static value
Financial report CL.FinancialReport

Picture 10. Configuration – Create Financial report from Incoming mail.

After the new Financial report is created, copies of attachments are created and references are edited on Financial report and on attachments, as seen in the Picture 11.


Dashboard
Configuration
Advanced
Configuration* > Extended object creation > Rule groups > Reclassify > Rules > Copy attachments and edit references
Name
Copy attachments and edit references
Alias
(not set)
Description
(not set)
Enabled
Yes
Configuration mode
Advanced
Trigger type
Object created
Trigger source
Object Type
Document {53F0C8FD-0BF0-47C4-8FA6-4C2D0DADB650}
Class
Financial report CL.FinancialReport
Workflow
Workflow (not set)
State
State (not set)
Search filters
(not set)
Vault search
(not set)
Update metadata in file
No (default)
New objects (1)
1 Item(s)
New object [1]
Type
FromTemplate
Template
ReferenceOnSource
Template property
Attachments PD.Attachments
Rename template files
Yes (default)
Properties
(not set)
Properties for removal
(not set)
Add source reference on new object
Property
Source PD.Source
Multi select lookup behaviour
Overwrite
Add new object reference on source
Property
Attachments PD.Attachments
Multi select lookup behaviour
Overwrite
Add new object reference on search result
(not set)
Advanced settings
(not set)
Add New object
Error handling behaviour
Continue (default)
Execution mode
Background

Picture 11. Creating copies of Attachments and editing references.