

10.3 The Multi-File

Watch this Video:  [The Multi-File](#) (3:00)

Multi-file: The ability to group the SAME document in its different *formats, variations, or parts* – as a single unit

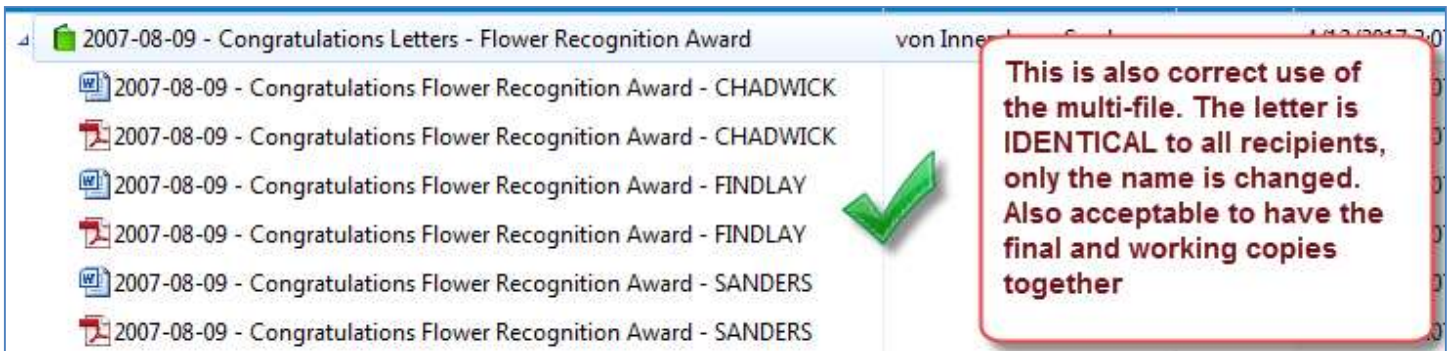


- **The Multi-File exists as one ID Number, so any documents *inside* the multi-file should represent a single document – matching the details listed on the metadata card.**
- This option should not be thought of as a folder to group different documents.
- ← The multi-file icon is a green book; notice only one book – letting you know that it's one document
- Useful feature, rather than saving the same document under many different ID numbers
- The contents of a multi-file document are viewed by expanding the arrow next to the icon or double-clicking it.

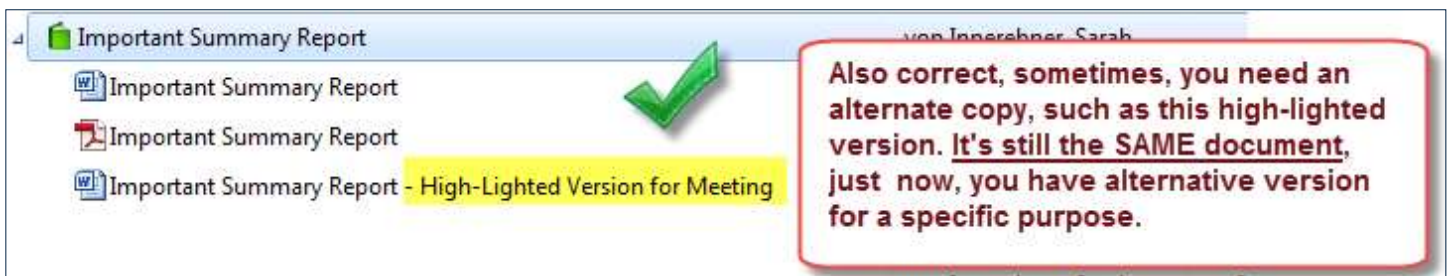
Examples of Multi-File use cases:



Multi-files have the symbol of ONE book. So the SAME document, just different formats



This is also correct use of the multi-file. The letter is IDENTICAL to all recipients, only the name is changed. Also acceptable to have the final and working copies together



Also correct, sometimes, you need an alternate copy, such as this high-lighted version. It's still the SAME document, just now, you have alternative version for a specific purpose.

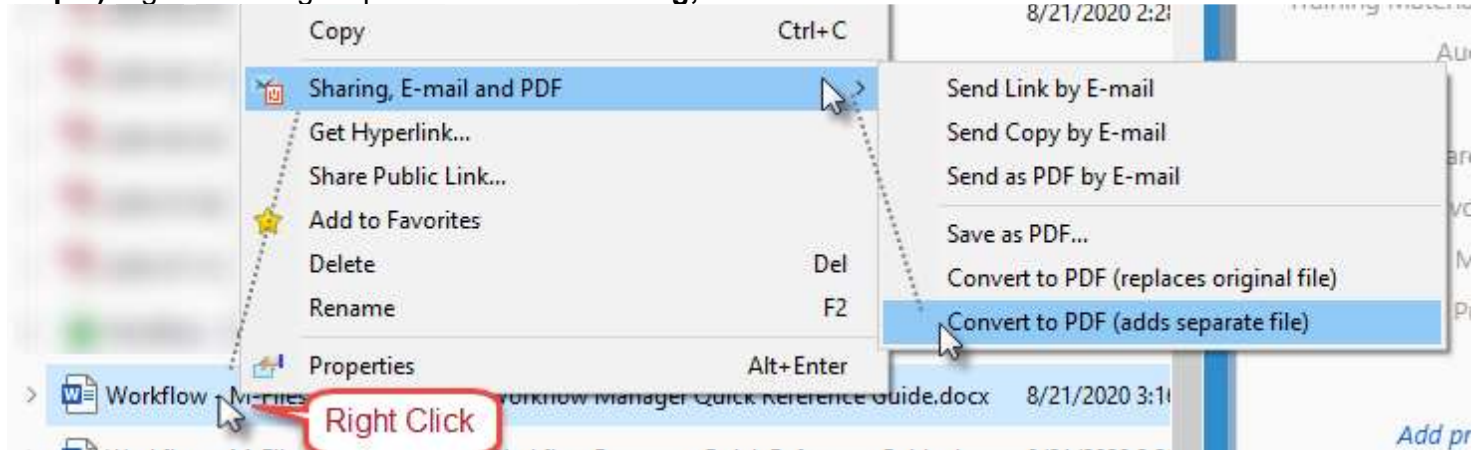
Ways to create a Multi-file

There are **three** main ways to create multi-files.

Multi-File Option 1) “PRINT” your document for an Instant *image* PDF of your Word document:

Step 1) Single Click to select your document

Step 2) Right-Click to get options → Go to “**Sharing, Email and PDF**”



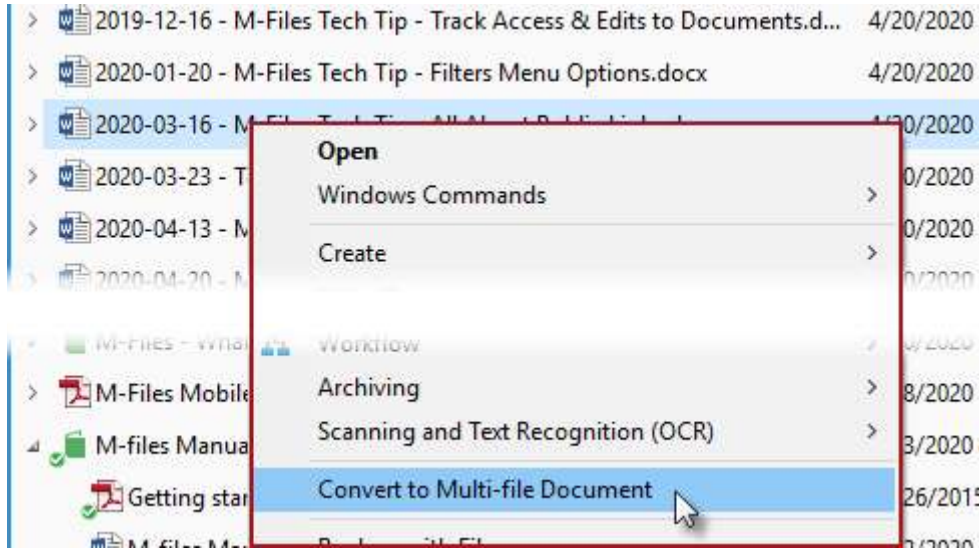
Step 3) Choose “**Save as PDF (adds separate file)**” – this will cause M-Files to open Word for a moment, ‘printing’ your document to a PDF and then packaging the PDF and Word document together into **ONE** multi-file:



TIP: If there are *any* links, Option 1, only ‘prints’ the PDF, if you want to preserve your links or special formatting. Use Option 2 “Convert a Single-file into a Multi-File”

Multi-File Option 2) Convert a Single-file into a Multi-File - you intend to add another document

Step 1) Check out your document, but don't open it (Right Click -> Check out)
Then Right Click->"Convert to Multi-file Document"



Step 2) Once your document is a multi-file, there's some options to add files to it:

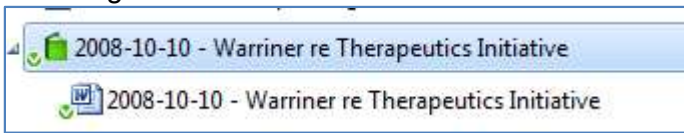
Option 1) Drag and Drop the other file formats directly onto the green book icon



TIP: M-Files will not check if you are adding *different* documents, but you know to **only add the same document, but in different formats!** You may also want to review: [Replace with file \(from another location or email attachment\)](#) (Or page 25 of the manual)

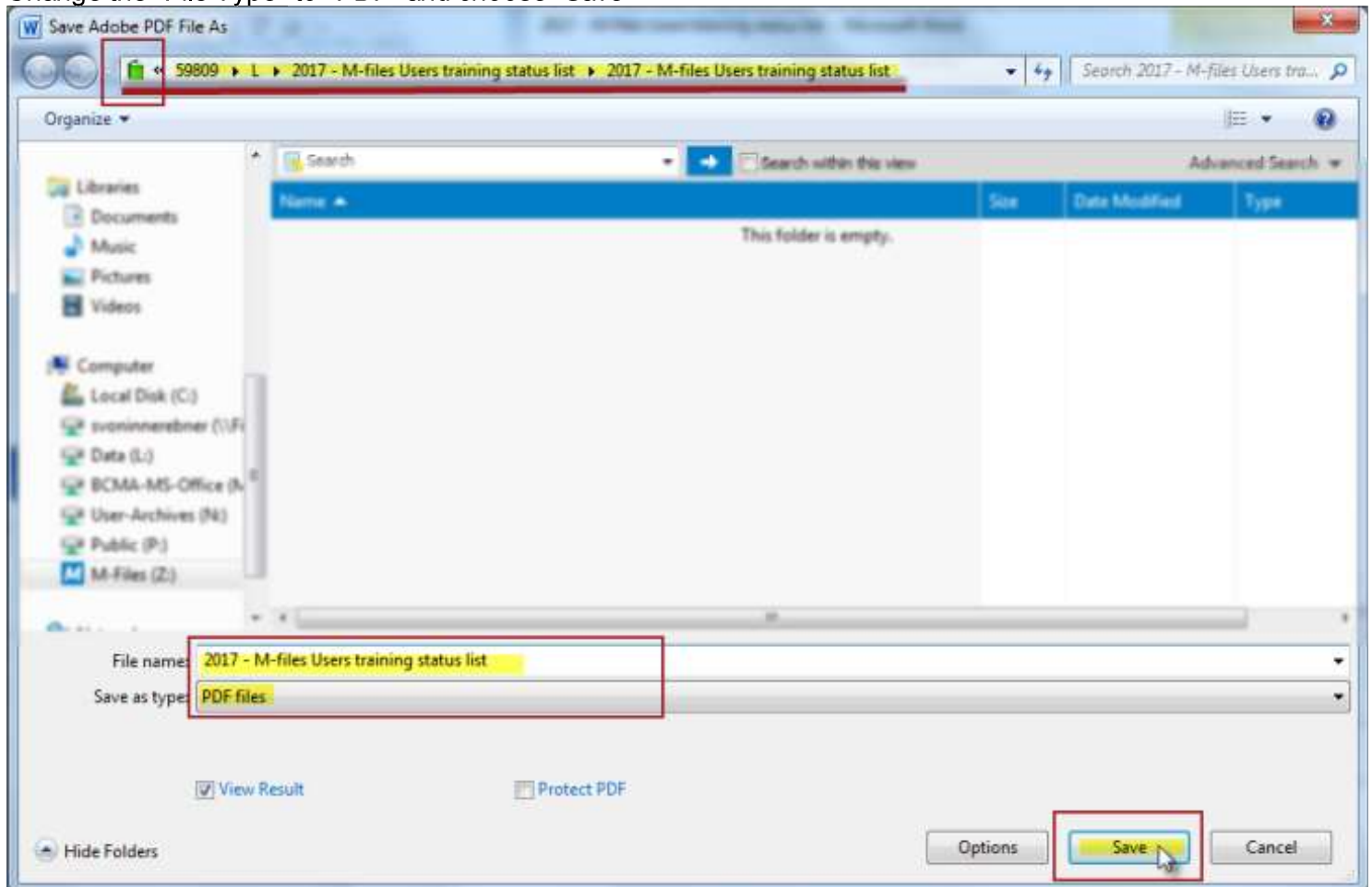
Multi-File Option 3) Add a PDF to be with your Word Document

Step 1) Check out your document, but don't open it (Right Click -> Check out)
Then Right Click->"Convert to Multi-file Document"

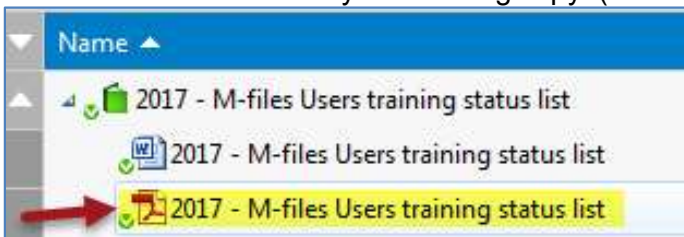


Step 2) Now that the multi-file is prepared, you can add your PDF. Open the Word (or Excel, or Power Point)

Step 3) In your Word Document (or excel, or Power Point),
go to 'Save As...' Choose "Browse..."
M-Files will bring you to the file path of the Multi-file where the working copy also exists.
Change the "File Type" to "PDF" and choose "Save"



You PDF will now be with your working copy: (sometimes the PDF shows up *after* check in)



TIP: Any time you want to update your PDF, follow the steps above.

You may also want to review: [Replace with file \(from another location or email attachment\)](#)

Last updated: 8/5/2021

Multi-File Option 4) MERGE different objects (like a Working Copy and the PDF) into a **NEW** Multi-File

NOT RECOMMENDED IF: your 2+ documents *have already existed* in M-Files for some time and *each object already has several versions* – merging them loses their history.

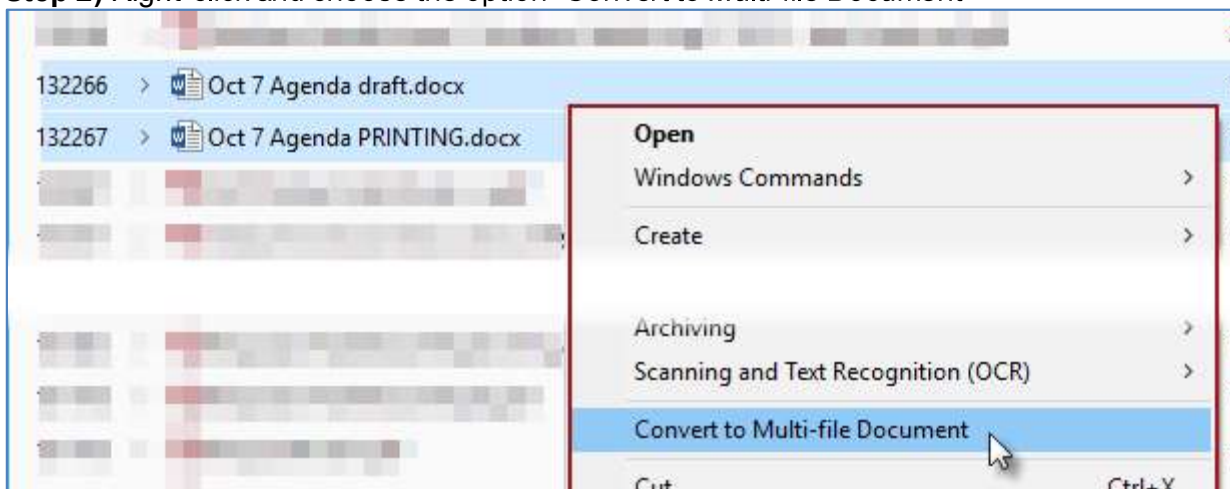
For Example) Word document is on version #20 and the PDF is on version #10. Merging the documents actually **WIPES** the history of both objects] – because the new Multi-file will have its own new ID# and thus its own history.

If you want to preserve the original working copy edits, review Option 2) Convert a Single-file into a Multi-File

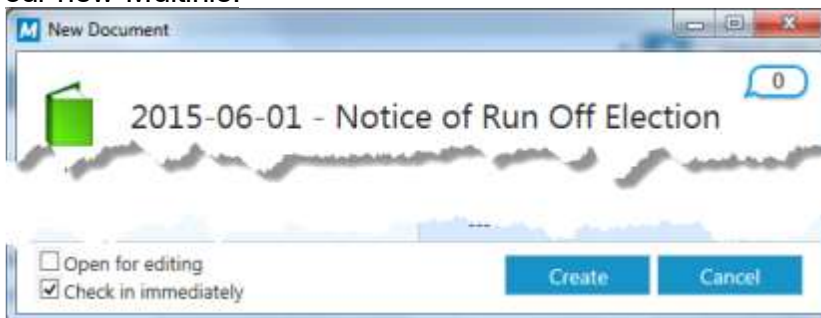
Step 1) Select both of the formats of your document.

TIP: If your objects are in different parts of the list, you can hold down the “CTRL” key to select your documents in the list; OR the “SHIFT” key if they are next together like the screen capture below:

Step 2) Right-click and choose the option “Convert to Multi-file Document”

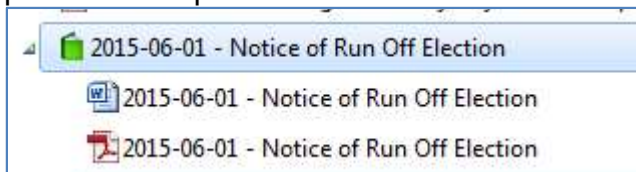


Step 3) You will now be presented with a **new** Metadata card that will MERGE your selected documents to create your new Multifile:



Step 4) Notice the information from the selected objects will be populated in the metadata card. Once you are happy with your metadata card, you can click “Create”

Step 5) The new multi-file will now be created. The advantage of this process is that you will have retained both of the documents’ unique “date created” information, and not the date that your multi-file process took place. The new multi-file has also been given a new ID number.

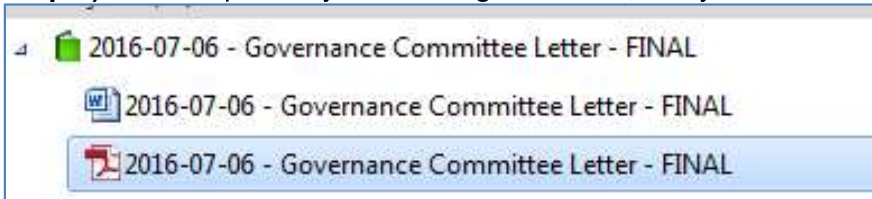


TIP: When documents are **MERGED** into a new multi-file, this option is not easily undone.

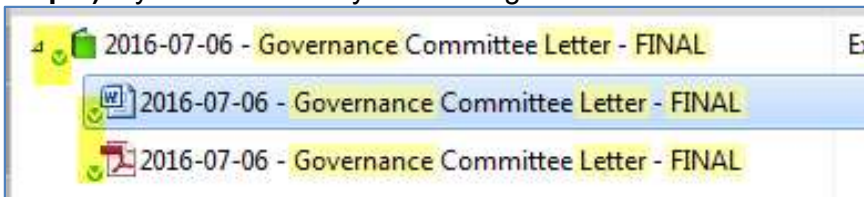
Update existing PDF in a Multi-File

If you already have a multi-file, but you revise/edit the WORD document (or the working version) the PDF will NOT automatically update alongside the word version

Step 1) You've updated your working document, and you now wish to update the PDF to be updated as well.

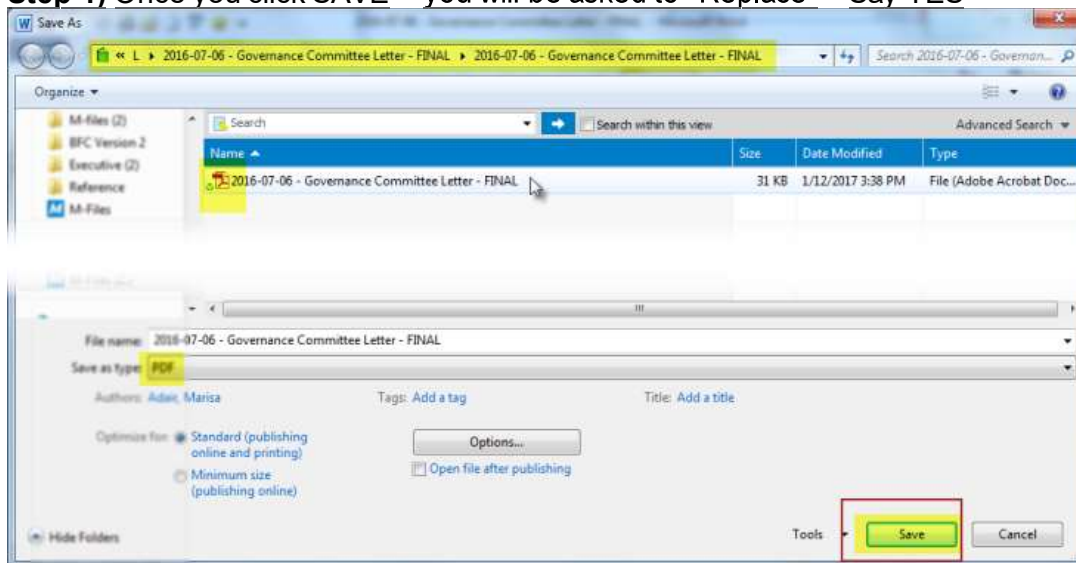


Step 2) If you double click your working version and CHECK-OUT, the entire Multi-file will be checked out.



Step 3) As you have your working copy open, you would go to "File -> Save As..." This lets you save OVER / Replace the OLD PDF.

Step 4) Once you click SAVE – you will be asked to "Replace" – Say YES



Convert a Multi-file back to a Single-file

If you have only one document in the multi-file, you can Right Click -> Convert to Single-file":

