



M-FILES DESKTOP UI REFRESH FAQ FOR CUSTOMERS

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VERSION 1.0

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1. Introduction

This document gives answers to most frequently asked questions.

2. Release information

2.1 Will the updated M-Files Desktop be released to everyone in November?

Yes, the updated M-Files Desktop will be officially released as part of the November'22 monthly update.

- Customers with 'automatic updates' turned on will be upgraded to the new desktop client during the November update period.
- Customers performing manual updates, will be upgraded to the new desktop client when the November '22 or later release has been installed on their workstation.

2.2 Will customers have a chance to preview or test the new user experience prior to November?

While this change has been long requested for and will provide a step forward both in usability and look & feel, we understand that it will nevertheless bring quite a change to our users who are used to the existing Desktop Client UI.

Therefore, a private preview (Alpha version) of the updated M-Files Desktop will be made available to all customers on September 27th. This preview does not contain all the changes you will see in the November release. For a list of changes, refer to number 4.3.

2.3 Can we continue to use pre 22.11 versions of M-Files Desktop with the 22.11 version of M-Files Server?

Yes, it is possible to upgrade M-Files Server version 22.11 and continue to use M-Files desktop version 22.10 and older. This gives you an opportunity to delay M-Files Desktop updates, if needed, without affecting the cloud server update schedule.

2.4 How to continue to use pre 22.11 versions of M-Files Desktop?

To continue using pre 22.11 version of the M-Files Desktop client, turn off automatic updates on the client computers. To disable automatic updates, please see [Disabling or enabling M-Files automatic updates](#).

2.5 Can we choose between the old and new user experiences?

No, we want our customers to fully benefit from the improved M-Files Desktop user experience as soon as possible, and since all existing functionalities will remain, there shouldn't be a compelling need for a rollback.

2.6 Will the 22.11 version of M-Files Desktop be compatible with older versions of M-Files server?

Yes, M-Files desktop versions 22.11 and older will work with M-Files Server 22.10 and older.

Note: Old client themes created with the Theme Editor will no longer be supported by the new Desktop Refresh UI. M-Files server version 22.11 will bring new theming settings to the M-Files Admin client.

3. How can I test the new client?

An Alpha version of the new client will be made available for all customers on 27th of September. The preview gives a chance to test the new client and update any relevant documentation prior the November release.

The preview will be accompanied by a simple utility application that enables admin users to switch back and forth between the old and the new client.

Instructions for downloading the preview version of the software can be found [here](#).

4. What is changing?

4.1 What benefits will this refresh bring to users?

The introduction of the new Desktop client brings a more unified user experience across all our clients:

- Enhanced layout for an effortless document management experience.
- Better visibility with a simplified navigation panel view giving you access to choose your desired default view.
- We strengthen our pinned view giving it a new location and grouping functionality for a smarter way to organize your vital documents.
- Faster way to navigate M-Files with an easier way to locate our search bar and create button.
- Cleaner design to navigate through your documents' information by repositioning the right panel tabs vertically on the right.

The overall design is aligned with the M-Files Web Client, resulting in lighter, borderless look.

New design offers better information layering with enhanced readability and less distraction.

The main view layout is simplified drastically. Four separate windows on the left are gone; instead, there is one big, clear main view panel.

Pinned view has been relocated to the left as part of the main navigation.

Search bar is moved to the main header, making it easier to locate and more logical to operate.

Right panel tabs are now repositioned vertically on the right.

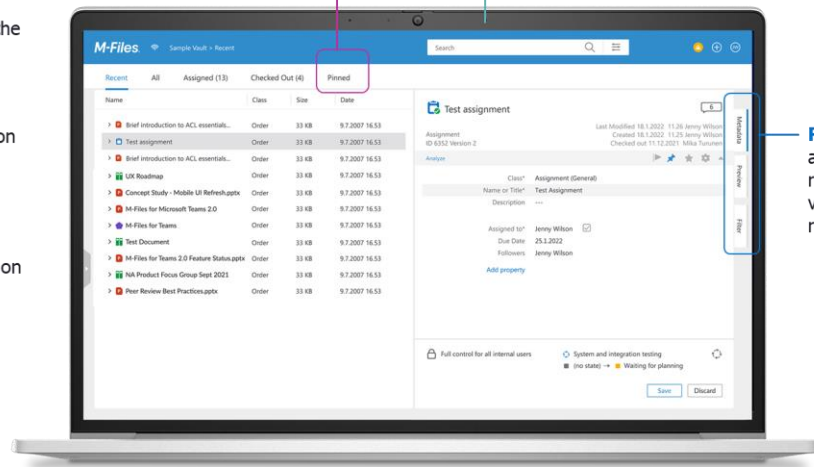


Figure 1. Desktop UI Refresh.

4.2 What are the changes to the M-Files Desktop user experience?

All key functionalities of the M-Files client will remain, but the design of the client is modernized to meet the user expectations. The new UI offers better visibility by simplifying the main navigation panel and enabling users to choose desired views. The refresh also strengthens usability by making it easier for users to find main controls and focus on content.

CHANGE	DESCRIPTION
Four-panel 'Home' view is replaced by navigation tabs	<ul style="list-style-type: none"> In the main view, the layout is simplified drastically. The overall design is aligned with the M-Files Web Client, resulting in lighter, borderless look. New design offers better information layering with enhanced readability and less distraction. Four separate view windows on the left are gone; instead, there is one big, clear main view panel. User can select any of the tabs as a default landing tab when opening the client.
Pinned view relocation	<ul style="list-style-type: none"> The pinned view has been relocated to the left side of the client as part of the main navigation tabs. Possibility to add new favorites has been removed, but the Favorites view is still available in the view listing. The user can also move current Favorites to Pinned items so that all the important items are in one place.
Search bar and search options relocation	<ul style="list-style-type: none"> The search bar is moved to the top pane, making it easier to locate and more logical to operate. The search options are opened below the search field as a floating box to maximize vertical space in the UI.
Top pane styling changes	<p>There are several changes to the top pane area, including:</p> <ul style="list-style-type: none"> Search bar is relocated to top pane Breadcrumb is added to top pane 'Network' icon is relocated to the left side of the pane 'Create' icon is relocated to the right side of the pane Navigation tabs are relocated to the main navigation area under the top pane There's a new 'User menu' icon

Listing styling changes	<p>There are several styling changes to the listing are, including:</p> <ul style="list-style-type: none"> • Listing background color • New highlight and hovering colors • Changes to font size and row height • Changes to relationships indentation
Dialog styling changes	<p>There are several styling changes to client dialogs, including:</p> <ul style="list-style-type: none"> • Dialog background color • Changes to font • Changes to button colors • Changes to tab styling (when applicable)
Metadata card styling changes	<p>There are several styling changes to the metadata card, including:</p> <ul style="list-style-type: none"> • Background color • Highlight and hover colors • Changes to font • Ribbon color and icon changes • Button color changes
Right pane tabs relocation	Right panel tabs are now repositioned vertically on the right.

Table 1 lists the most notable changes in the new Desktop client UI.

Table 1. Changes in the new Desktop UI.

4.3 What are the changes between Customer preview version and the November release version?

Table 2 lists the changes that are targeted for November release but are not yet present in the Customer preview release.

Table 2. Upcoming changes targeted for November release.

#	CHANGE	DESCRIPTION
1	'All' tab placement and default landing tab	'All' tab will be placed as the leftmost tab in the navigation area. 'All' tab is set as the default landing tab in the Desktop client. End-user can change the default landing tab from the user menu.
2	'Pinned' as landing tab	End-user will be able to set 'Pinned' tab as landing tab. In the preview release, 'Pinned' tab is shown as an option in the user menu but selecting it does not have an effect yet.
3	Dialog UI enhancements	Dialog windows will get an updated look with changes in their background color, font, buttons, and tabs (when applicable).
4	Client window minimum width changes	There will be a restriction for how narrow the client window can be set by the user, to ensure the readability of the different UI elements.
5	Metadata card UI enhancements	Some metadata card icons and fonts in the metadata card ribbon will be changed to ensure their readability. 'Analyze result' labels' style is updated. Mandatory field texts' style is updated.
6	More prominent 'Create' button	'Create' button look will be updated to make it stand out more. In addition, both the 'Create' button and the User menu icon size will be larger and have a hover color.
7	Listing highlight color when focus is not in the listing	Object selection color in the listing will be retained dark grey even after the focus is moved away from the listing.
8	Pinned item box minimum width changes	Pinned item box minimum width will be wider than in the preview version, to make it easier to distinguish item names.
9	Theming settings	Theming settings will be added to MF Admin client to apply theming to the client.

4.4 Is Desktop Refresh compatible with Windows 11?

Yes, the new client is fully compatible with Windows 11. With Win11, the new client will also bring the Windows command bar to the top of the client.

4.5 Will metadata card configurations continue working normally?

Yes, metadata card configurations - including theming rules - will continue working as before.

4.6 Will all UI Extensibility applications continue to work?

Yes, UI Extensibility applications should continue to work as before. The UI Extensibility APIs have not been updated and no other potential breaking issues have been introduced as part of the M-Files Desktop Refresh. M-Files does conduct testing for a set of UI Extensibility applications. Although we do not expect any breaks, it is recommended that customers verify their UI Extensibility application against a M-Files Desktop Refresh preview build.

4.7 Will all M-Files add-ons, especially UI focused applications like GANTT Chart and Process Maps, continue to work?

All M-Files add-ons will function normally. There are currently a few items that reference the old UI, but those are on the backlog and will be updated. Those items are cosmetic and do not cause issues with functionality in the applications.

4.8 Can the user choose which main navigation tab is displayed by default?

Yes. This can be done via [User menu] -> User Settings -> Default landing page.

The options are:

- Recent
- All
- Checked Out
- Assigned

4.9 Are any system requirements for using M-Files Desktop changing?

The M-Files Desktop Refresh will not change any M-Files Desktop client requirements.

4.10 Will the User Guide be updated in November to reflect the changes to the user experience?

- Yes, the user guide will be updated as part of the release.
- All the information regarding this release and resources can be found in the community designated page [here](#).

5. Feedback & more information

To get more information about the Desktop Refresh, please use the following channels:

- Contact your **M-Files representative**.
- There will also be a thread in the **M-Files Community** for feedback and visibility of answers.