

INTRODUCING THE NEW DESKTOP USER INTERFACE

M-Files

WHY ARE WE DOING AN UI REFRESH?

1

To **modernize** the main UI of the Desktop client design.

3

To **align it with other clients**, mainly Web and Mobile.

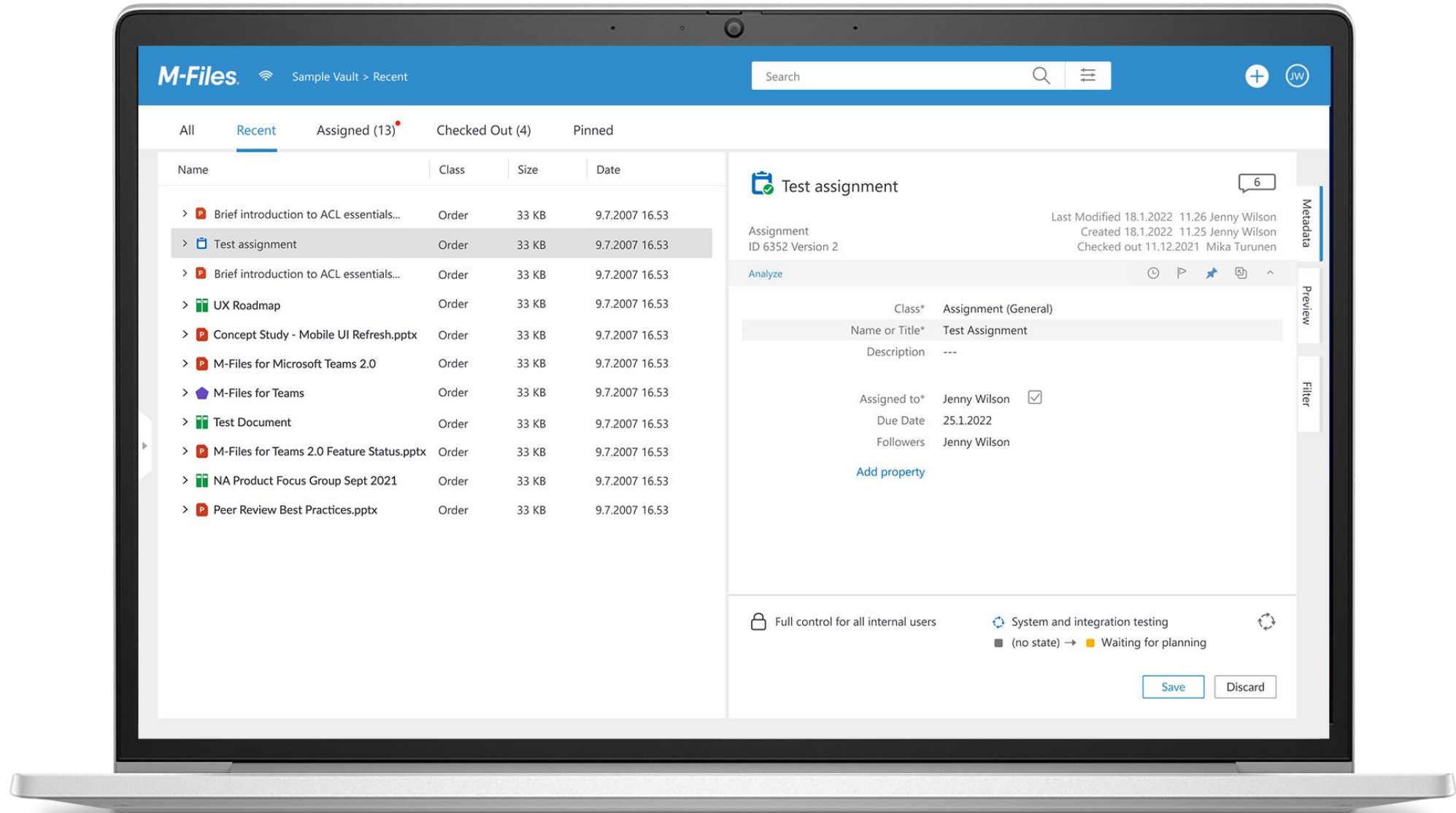
2

To **improve usability** by simplifying the main view, making it easier for users to find main controls, focus on content, and navigate around.

4

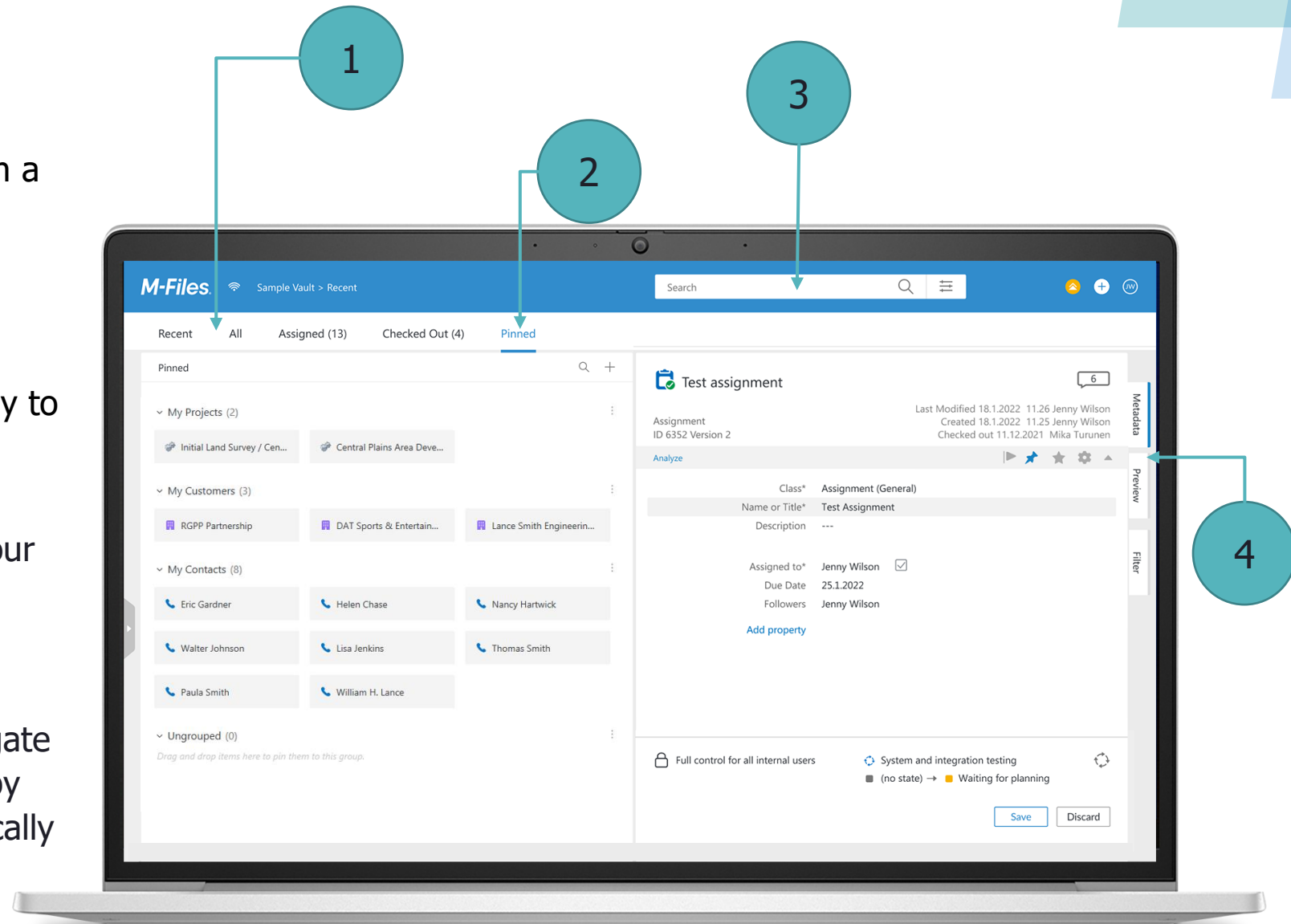
To build a stronger brand identity and improve the **consistency** of the user experience.

FRESH BUT FAMILIAR, READY TO ROLL



CHANGES AND BENEFITS

- 1. Main Navigation:** Better visibility with a simplified navigation panel view and a possibility to choose your default view.
- 2. Pinned View:** A new location and grouping functionality for a smarter way to organize your vital documents.
- 3. Search Bar:** An easier way to locate our search bar and Create button, which enables faster navigation in M-Files.
- 4. Panel Tabs:** A cleaner design to navigate through your documents' information by repositioning the right panel tabs vertically on the right.



HOMEPAGE

M-Files

Assigned to me

Pinned

Search

+

D

Views

All

Recent

Assigned (1)

Checked out (2)

Pinned

Name	Type
Proposals effective date coming up in 2 weeks	View
Proposals missing project	View
Common Views	
1. Documents	View
2. Manage Customers	View
3. Manage Projects	View
4. Manage Employees	View
5. Advanced Sample Views	View
Templates	View
Other Views	

Metadata

Preview

Filters

Metadata card

Select an object to view its metadata.

- Metadata card
- Preview
- Search Filters

ALL (VIEWS)

Created by each user






Built-in views

All		Recent	Assigned (1)	Checked out (2)	Pinned
Name	Type				
▲ My Views					
👤 Documents created by me	View				
👤 Proposals effective date coming up in 2 ...	View				
👤 Proposals missing project	View				
▲ Common Views					
📊 1. Documents	View				
📊 2. Manage Customers	View				
📊 3. Manage Projects	View				
📊 4. Manage Employees	View				
📊 5. Advanced Sample Views	View				
📊 Templates	View				
▲ Other Views					
📁 Assigned to Me	View				
📁 Checked Out to Me	View				
★ Favorites	View				
🕒 Recently Accessed by Me	View				
📊 Recently Modified by Me	View				
📊 Offline	View				

- Created by the Administrator
- Shown to all users


RECENT

Documents and objects
that you have recently
accessed

All	Recent	Assigned (1)	Checked out (2)	Pinned
Name		Size	Accessed by Me ↓	
▲ Documents (5)				
>	 Company Brochure / ESTT	89 KB	13.9.2022 15.47	
>	 Brochure / Legal Services	89 KB	13.9.2022 15.47	
>	 Sales Training - Day 1 (OMCC)	97 KB	13.9.2022 15.46	
>	 Agenda - Project Meeting 6/2022	28 KB	13.9.2022 15.07	
>	 Proposal 7734 - A&A Consulting (AEC)	28 KB	12.9.2022 10.53	



ASSIGNED

Assignments that have been assigned to you

All Recent <u>Assigned (1)</u> Checked out (2) Pinned		
Name	Deadline ↑	Assignment description
>  Assignment: Fill in Metadata		

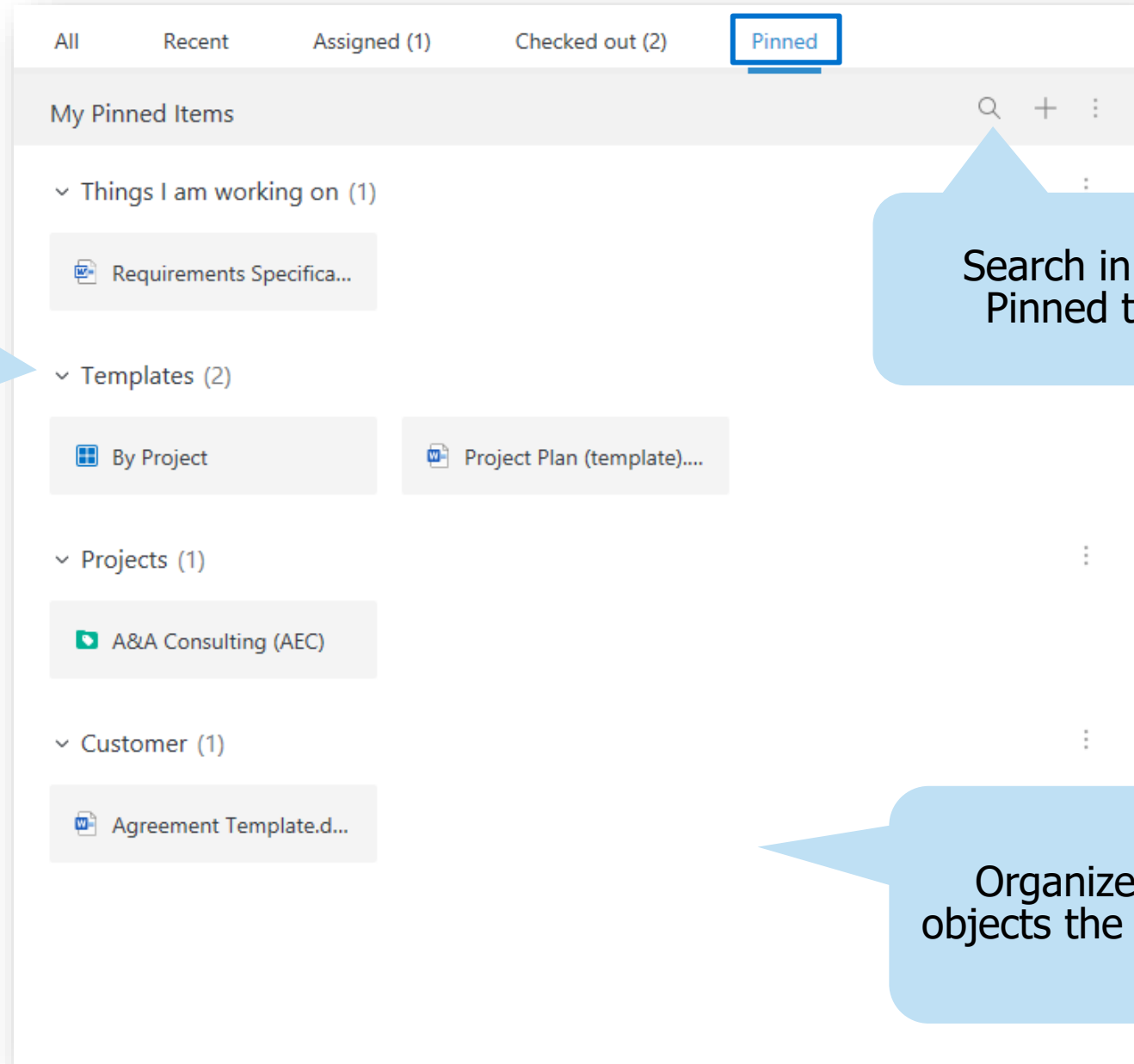
CHECKED OUT

Documents and objects
you have checked out

All			Recent			Assigned (1)			Checked out (2)			Pinned		
Name ↑			Size			Date Modified								
>		Proposal 7734 - A&A Consulting (A...	28 KB			20.7.2022 10.37								
>		Training Slides				27.6.2022 15.23								

PINNED

Frequently needed
information easily in
one place



Search in the
Pinned tab

Organize and group
objects the way you want

METADATA CARD

M-Files. Sample Vault > Recent

Search

Recent

All

Assigned (13)

Checked Out (4)

Pinned

Name	Class	Size	Date
> Order for Electrical engineering.doc	Order		
> Order for Electrical installing.doc	Order		
> IIB Project Management Plan.doc	Order		
> Proposal 7701 - City of Chicago (Planning)	Proposal		
> Proposal 7708 - City of Chicago (Planning)	Proposal		
> Request for Proposal - Electrical Engineering	Request for Proposal		
> Request for Proposal - HVAC Engineering	Request for Proposal		
> Customers (1)			
> Projects (1)			
> Request for Proposal - Land Construction	Request for Proposal		
> Sales Invoice 237 - City of Chicago (Planning)	Order		
> Sales Invoice 239 - City of Chicago (Planning)	Order		

IIB Project Management Plan.doc

Document
ID 6352 Version 2

Last Modified 18.1.2022 11:26 Jenny Wilson
Created 18.1.2022 11:25 Jenny Wilson
Checked out 11.12.2021 Mika Turunen

Analyze

Class*	Document
Name or Title*	IIB Project Management Plan.doc
Description	---
Assigned to*	Jenny Wilson <input checked="" type="checkbox"/>
Due Date	25.1.2022
Followers	Jenny Wilson

Add property

Full control for all internal users

System and integration testing

(no state) → Waiting for planning

Save

Discard

Metadata

Preview

M-Files.

PREVIEW

M-Files. Sample Vault > Recent

Search

Recent

All

Assigned (13)

Checked Out (4)


Pinned

Name	Class	Size	Date
Documents			
> Order for Electrical engineering.doc			Order
> Order for Electrical installing.doc			Order
> IIB Project Management Plan.doc			Order
Customers (1)			
Projects (1)			
> Office Design			Customer Project
> Proposal 7701 - City of Chicago (Planning)			Proposal
> Proposal 7708 - City of Chicago (Planning)			Proposal
> Request for Proposal - Electrical Engineering			Request for Proposal
> Request for Proposal - HVAC Engineering			Request for Proposal
Customers (1)			
Projects (1)			
> Request for Proposal - Land Construction			Request for Proposal
> Sales Invoice 237 - City of Chicago (Planning)			Order
> Sales Invoice 239 - City of Chicago (Planning)			Order

Preview

VERSION 4.0

DECEMBER 12, 2020



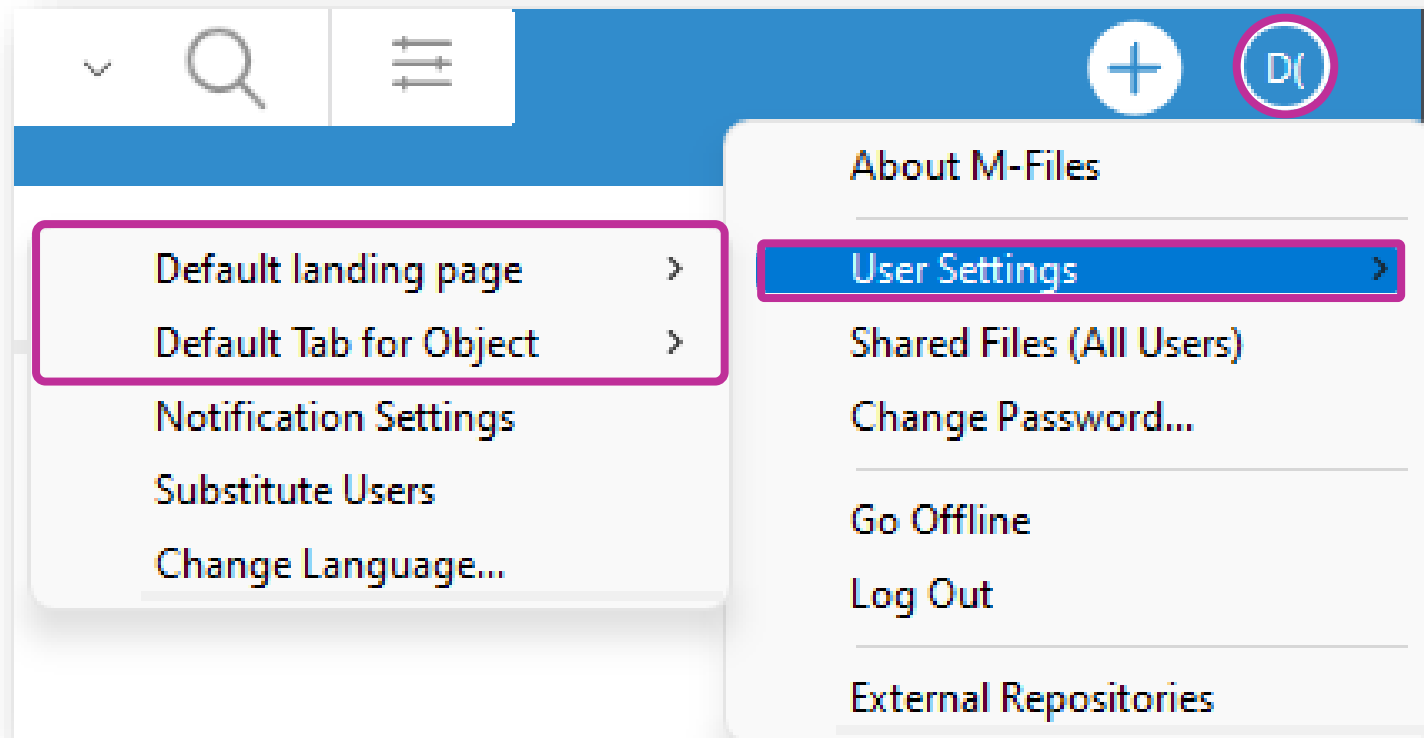
PROJECT MANAGEMENT PLAN

AUSTIN DISTRICT REDEVELOPMENT

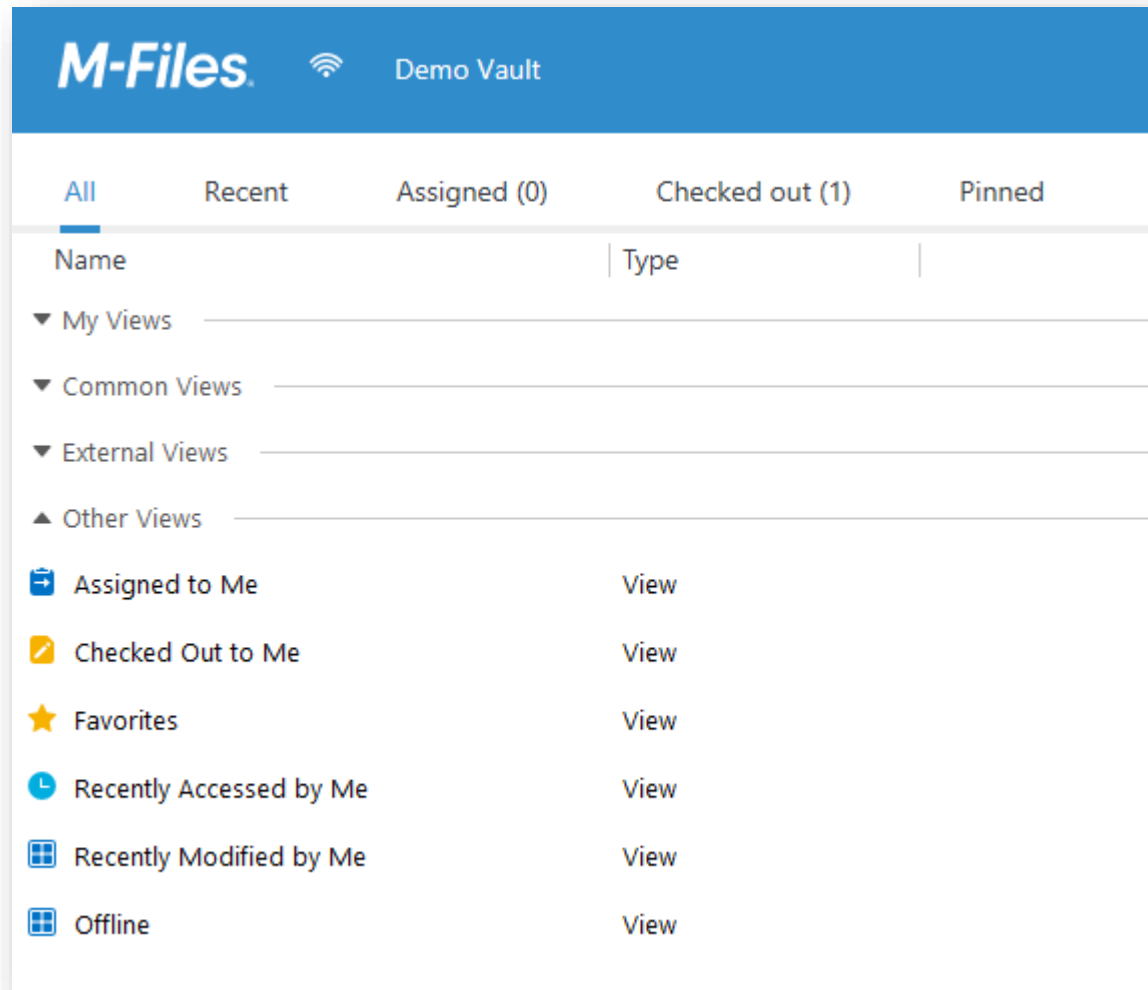
Metadata

Preview

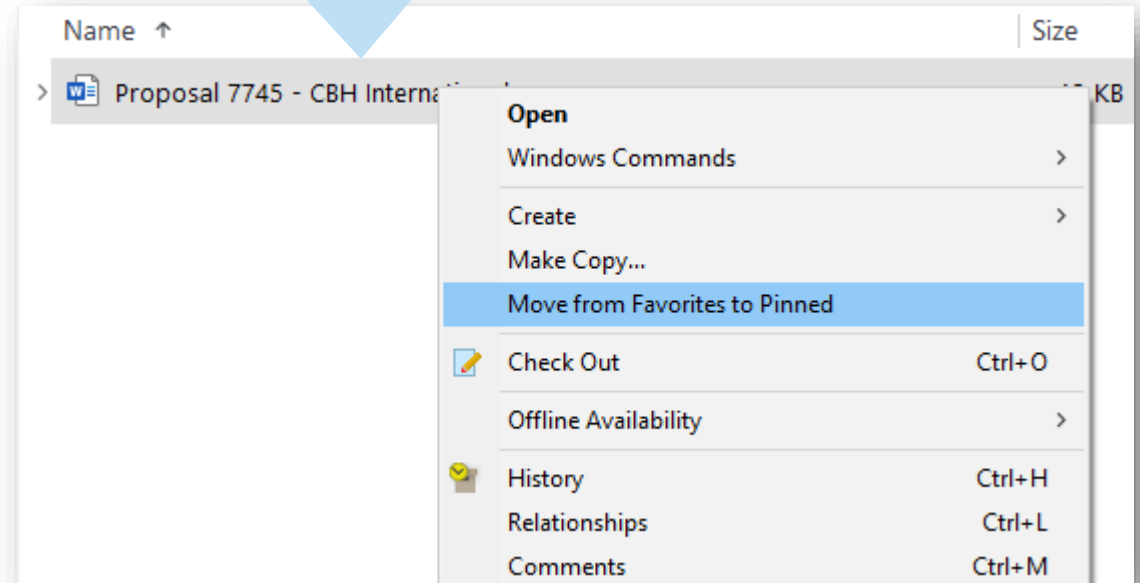
USER SETTINGS: DEFAULT LANDING PAGE AND TAB FOR OBJECT



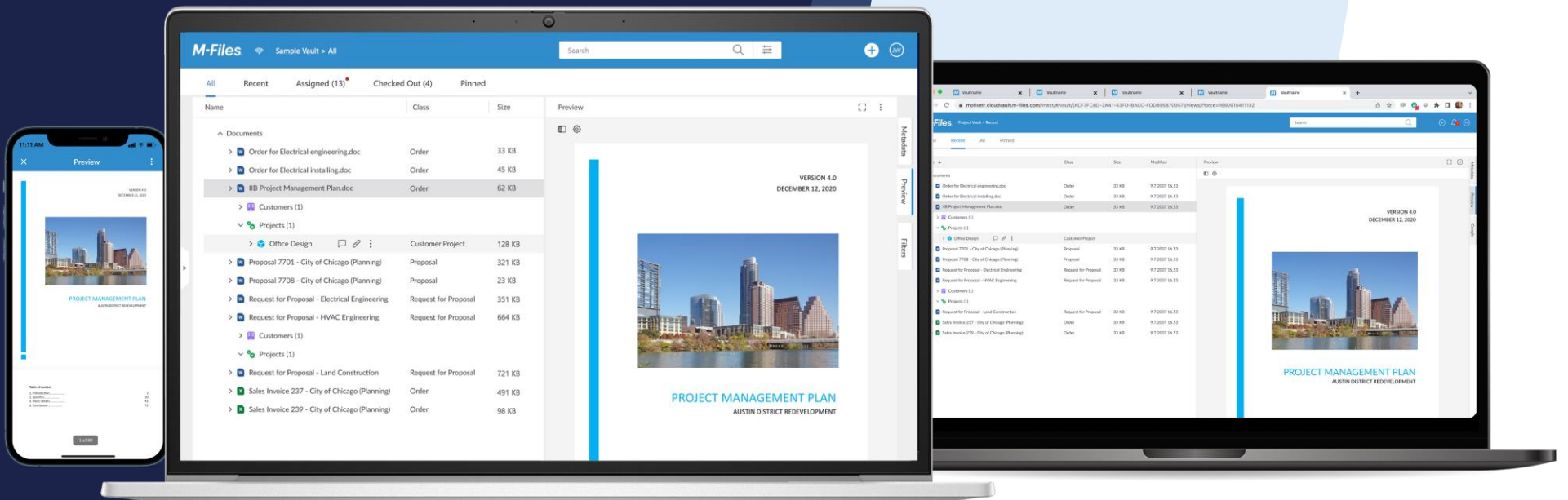
FAVORITES TO PINNED TAB



You can move multiple objects from favorites to the Pinned tab at the same time



UNIFIED IDENTITY FOR DESKTOP, WEB, AND MOBILE (IOS)



M-Files

Home

Motive Tampere > Recently Accessed by Me

Search

+ 🔔 👤

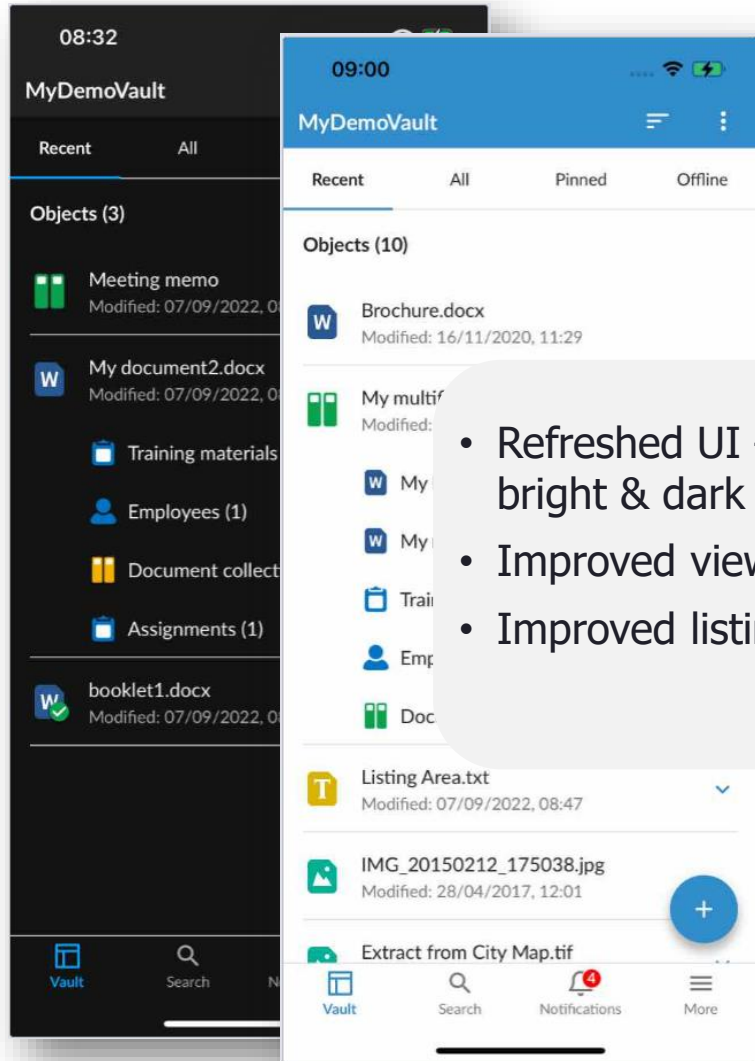
Recent

All

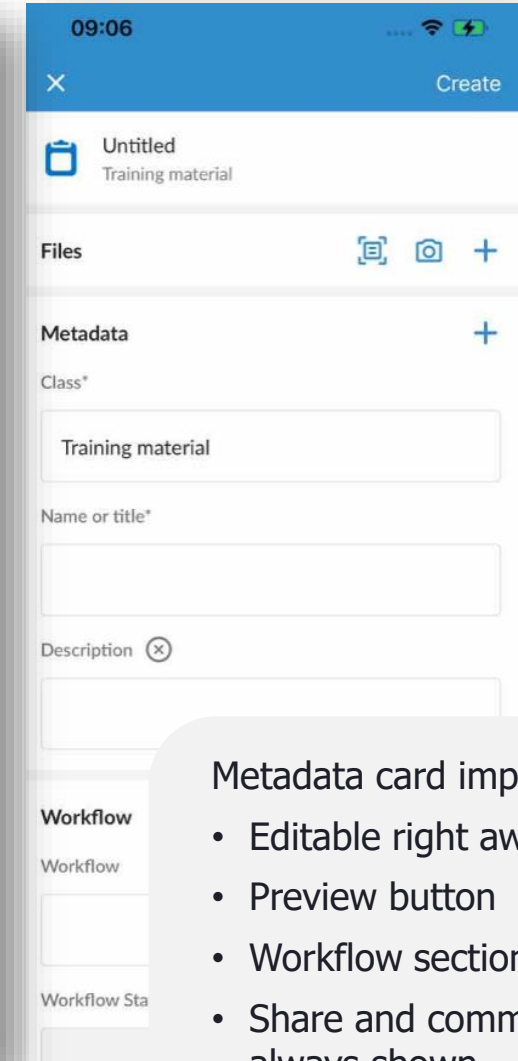
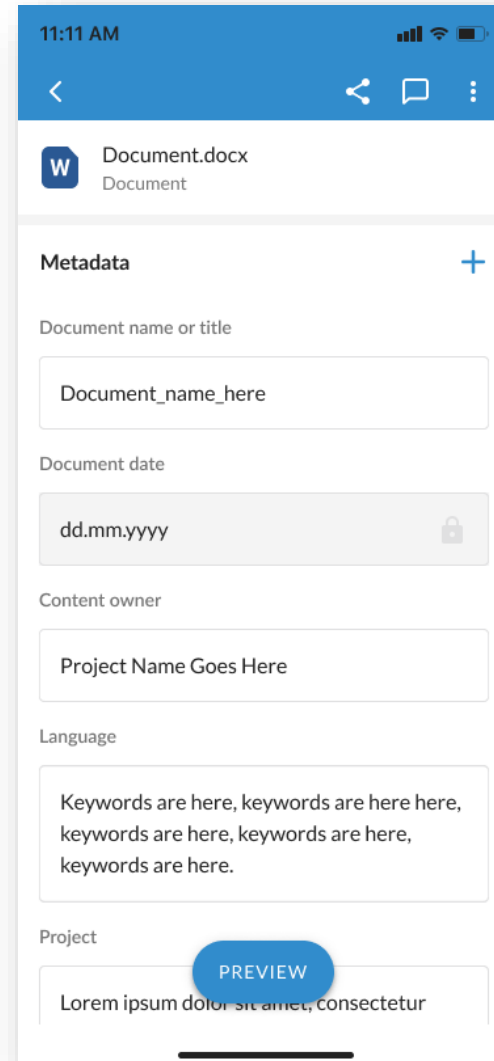
Pinned

Name	Size	Metadata	Preview
▼ Objects (1-50 of 61)		<div><div>Document</div><div>Desktop UI Refresh - CS Org Assets (Internal)</div><div>ID 409533 Version 17</div></div> <div><div>Class*</div><div>Other Marketing Material</div><div>Name or Title*</div><div>Desktop UI Refresh - CS Org Assets (Internal)</div><div>Language</div><div>English</div><div>Document Date</div><div>9/16/2022</div><div>Account</div><div></div><div>Media (Advertisizing)</div><div></div><div>Media Name</div><div></div><div>Keywords</div><div>Product Marketing, Desktop UI Refresh, Product Launch</div><div>Description</div><div></div><div>Additional contribut...</div><div></div><div>Content Owner</div><div></div><div>Add property</div></div> <div><div>Created</div><div>9/16/2022 6:44 PM</div><div>Kelly Revilla</div><div>Last Modified</div><div>9/20/2022 7:51 PM</div><div>Kelly Revilla</div><div>Permissions</div><div>🔒 Full control for all internal users</div><div>Workflow</div><div></div><div>State transition</div><div></div><div>Save</div><div>Discard</div></div>	<div><div>View</div><div>Edit</div><div>Enhanced user interface for an effortless document management experience</div><div><div>1</div><div>2</div><div>3</div><div>4</div></div><div><div>1. Main Navigation</div><div>Better visibility with a simplified navigation panel view giving you access to choose your desired default view.</div><div>2. Pinned View</div><div>We strengthened our pinned view giving it a new location and grouping functionality for a smarter way to organize your vital documents.</div><div>3. Search Bar</div><div>Faster way to navigate M-Files with an easier way to locate our search bar and create button.</div><div>4. Panel Tabs</div><div>Cleaner design to navigate through your documents' information by repositioning the right panel tabs vertically on the right.</div></div></div>

M-FILES MOBILE UI REFRESH (IOS):

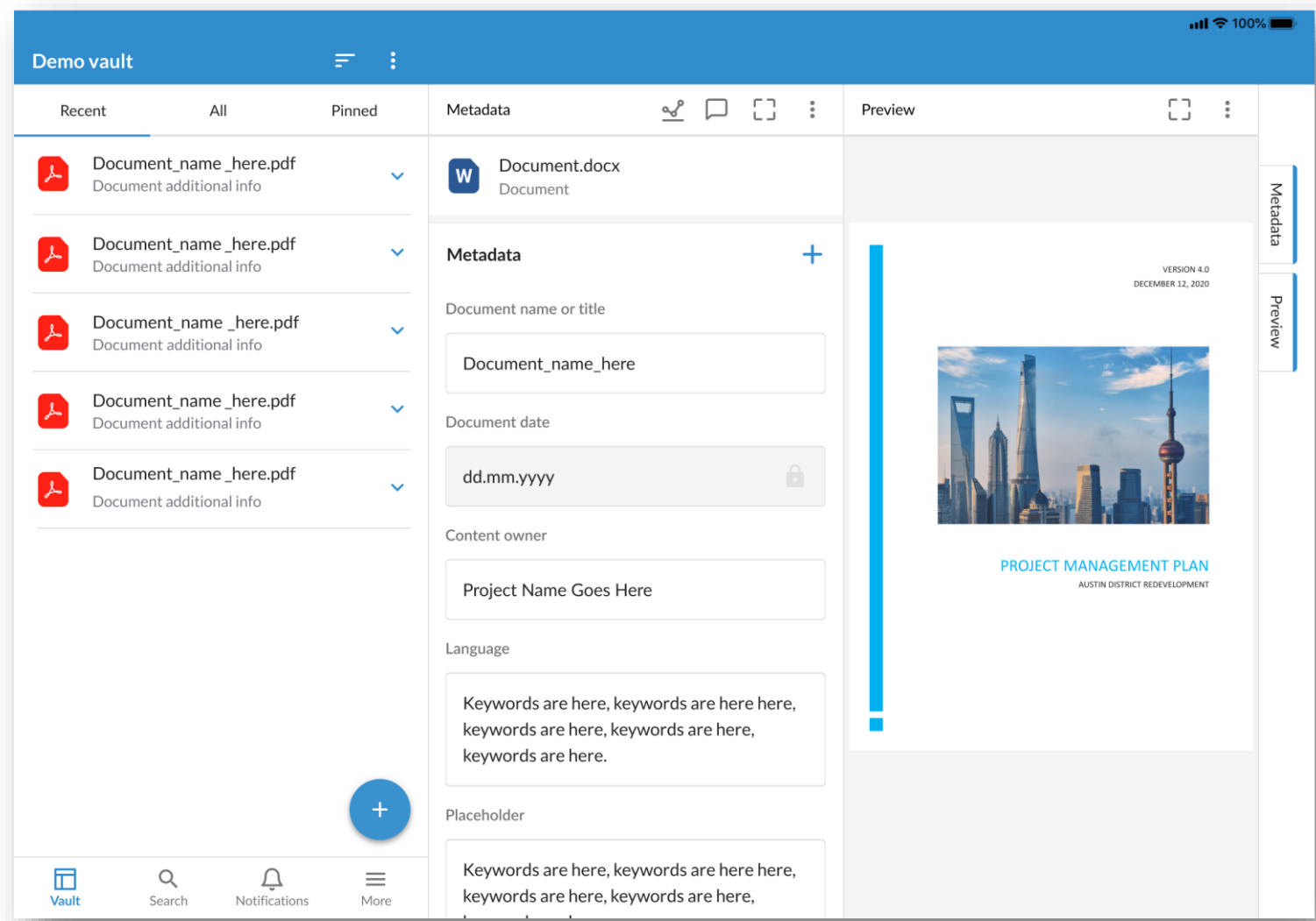


- Refreshed UI – Both bright & dark themes
- Improved view navigation
- Improved listing area



- Metadata card improvements:
- Editable right away
 - Preview button
 - Workflow section
 - Share and comment buttons always shown

NEW LAYOUT IN IPAD:



New iPad layout: Listing, metadata card, and preview are shown at the same time. Possibility to close them when not needed.

LEARN MORE

- [M-Files Community](#)
 - [Blog](#)
 - [Resources](#)
 - [Webinars](#)





THANK YOU!