

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

The screenshot displays the M-Files application interface. At the top, the 'M-Files' logo is on the left, followed by 'Sample Vault > Recent'. A search bar and user profile 'JW' are on the right. Below the header, there are tabs for 'All', 'Recent', 'Assigned (13)', 'Checked Out (4)', and 'Pinned'. The 'Recent' tab is active, showing a list of files with columns for Name, Class, Size, and Date. The file 'Test assignment' is selected and highlighted. To the right of the file list, a detailed view for 'Test assignment' is shown. It includes a title 'Test assignment' with a notification bubble '6', a description 'Assignment ID 6352 Version 2', and metadata such as 'Last Modified 18.1.2022 11.26 Jenny Wilson', 'Created 18.1.2022 11.25 Jenny Wilson', and 'Checked out 11.12.2021 Mika Turunen'. Below this, there are sections for 'Analyze', 'Class* Assignment (General)', 'Name or Title* Test Assignment', 'Description ---', 'Assigned to* Jenny Wilson' (with a checkmark), 'Due Date 25.1.2022', and 'Followers Jenny Wilson'. At the bottom of the detailed view, there are status indicators: 'Full control for all internal users', 'System and integration testing' (with a refresh icon), and '(no state) → Waiting for planning'. 'Save' and 'Discard' buttons are at the bottom right.

Name	Class	Size	Date
> Brief introduction to ACL essentials...	Order	33 KB	9.7.2007 16.53
> Test assignment	Order	33 KB	9.7.2007 16.53
> Brief introduction to ACL essentials...	Order	33 KB	9.7.2007 16.53
> UX Roadmap	Order	33 KB	9.7.2007 16.53
> Concept Study - Mobile UI Refresh.pptx	Order	33 KB	9.7.2007 16.53
> M-Files for Microsoft Teams 2.0	Order	33 KB	9.7.2007 16.53
> M-Files for Teams	Order	33 KB	9.7.2007 16.53
> Test Document	Order	33 KB	9.7.2007 16.53
> M-Files for Teams 2.0 Feature Status.pptx	Order	33 KB	9.7.2007 16.53
> NA Product Focus Group Sept 2021	Order	33 KB	9.7.2007 16.53
> Peer Review Best Practices.pptx	Order	33 KB	9.7.2007 16.53

Test assignment 6

Assignment
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* Assignment (General)

Name or Title* Test Assignment

Description ---

Assigned to* Jenny Wilson

Due Date 25.1.2022

Followers Jenny Wilson

Add property

Full control for all internal users

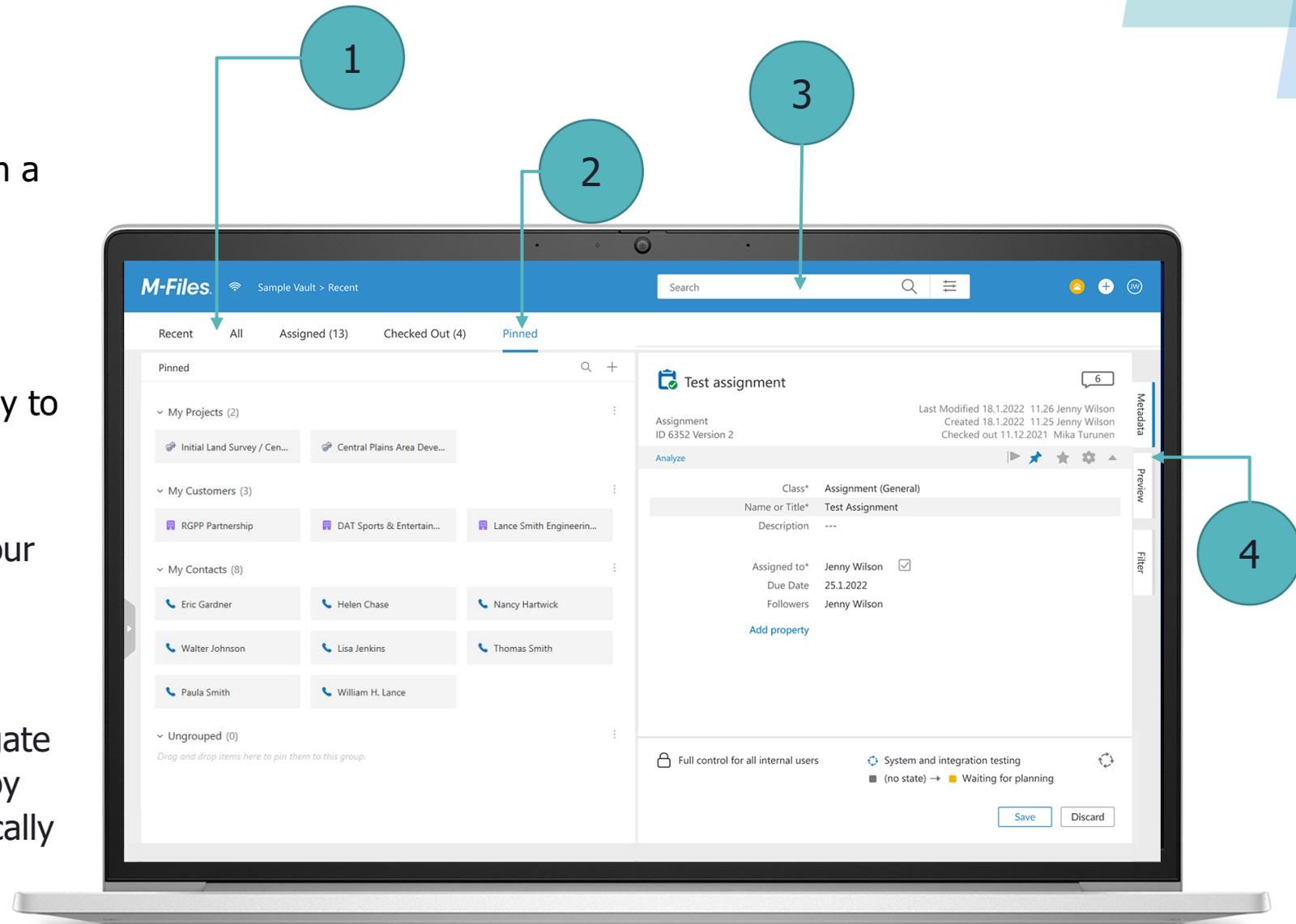
System and integration testing

(no state) → Waiting for planning

Save Discard

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

The screenshot shows the M-Files homepage interface. At the top left is the M-Files logo. To its right is a search bar with a magnifying glass icon and a dropdown arrow. Further right are two circular icons: a plus sign and a user profile icon. Below the search bar is a navigation bar with five tabs: 'All', 'Recent', 'Assigned (1)', 'Checked out (2)', and 'Pinned'. A 'Views' callout points to this navigation bar. Below the navigation bar is a table with columns for 'Name' and 'Type'. The table contains several rows, including 'Proposals effective date coming up in 2 weeks' and 'Proposals missing project'. A 'Recently Accessed by me' callout points to the first row, and a 'Checked out to me' callout points to the second row. To the right of the table is a 'Metadata card' section with the text 'Select an object to view its metadata.' and a callout listing 'Metadata card', 'Preview', and 'Search Filters'. At the bottom left, there is a '15 items' indicator. At the bottom right, there are icons for a list view and a grid view. A 'Quick Search' callout points to the search bar.

Quick Search

M-Files

Assigned to me

Pinned

Search

Views

All

Recent

Assigned (1)

Checked out (2)

Pinned

Recently Accessed by me

Checked out to me

- Metadata card
- Preview
- Search Filters

Metadata card

Select an object to view its metadata.

Metadata

Preview

Filters

15 items

ALL (VIEWS)

Created by each user

Built-in views

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	Assigned (1)	Checked out (2)	Pinned
Name	Deadline ↑	Assignment description		
>  Assignment: Fill in Metadata				

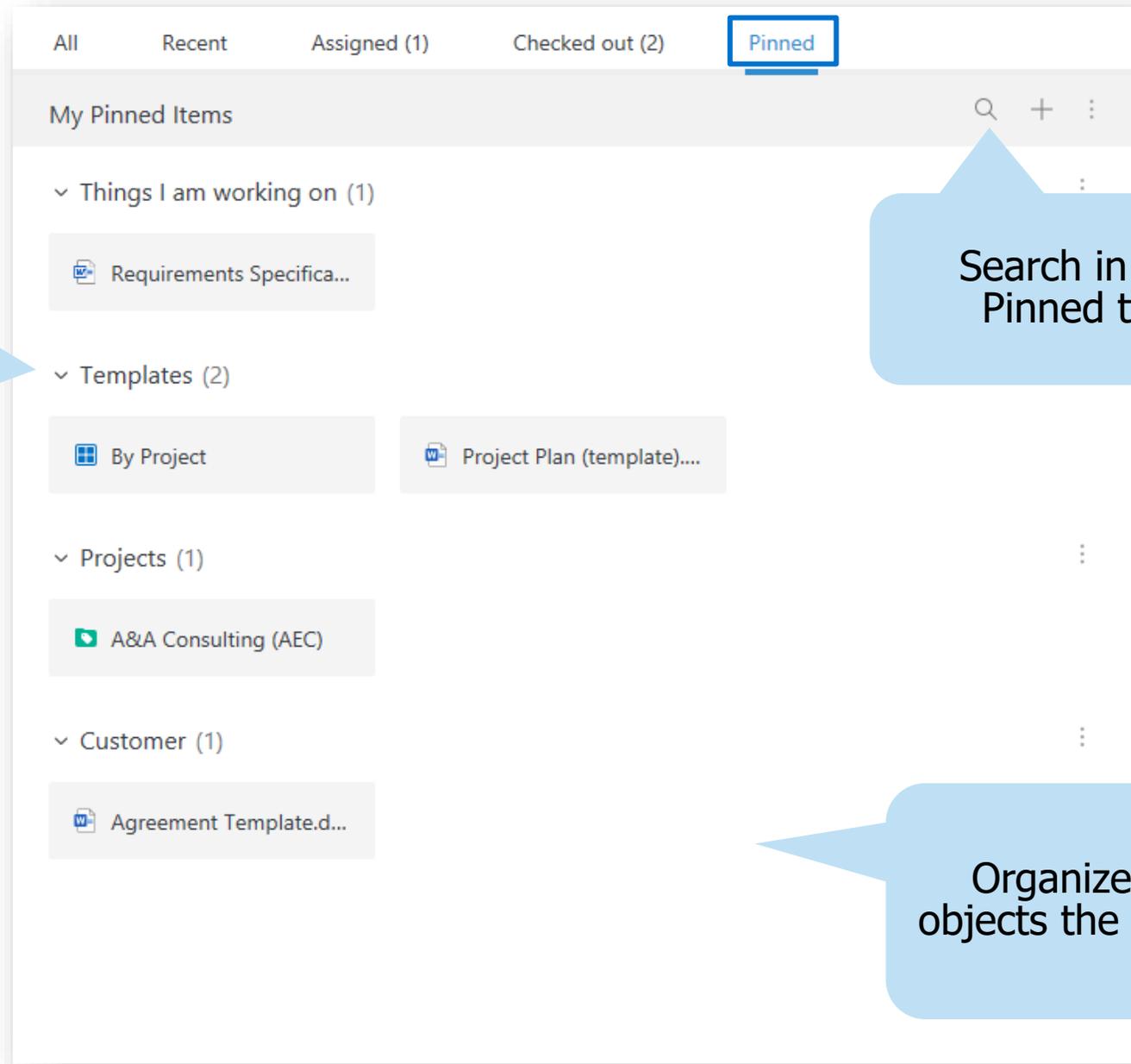
CHECKED OUT

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

The screenshot displays the M-Files interface. At the top, the header includes the M-Files logo, a signal strength indicator, and the text "Sample Vault > Recent". A search bar is located on the right side of the header. Below the header, there are navigation tabs: "Recent", "All", "Assigned (13)", "Checked Out (4)", and "Pinned". The "Recent" tab is active.

The main content area is divided into two sections. On the left is a file list table with columns for "Name", "Class", "Size", and "Date". The file "IIB Project Management Plan.doc" is selected and highlighted. On the right is a metadata card for the selected document.

File List Table:

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		

Metadata Card for "IIB Project Management Plan.doc":

- Title:** IIB Project Management Plan.doc
- Document ID:** ID 6352 Version 2
- Class:** Document
- Last Modified:** 18.1.2022 11.26 Jenny Wilson
- Created:** 18.1.2022 11.25 Jenny Wilson
- Checked out:** 11.12.2021 Mika Turunen
- Actions:** Analyze, Play, Star, Settings, Up Arrow
- Table:**

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
- Buttons:** Add property, Save, Discard
- Footer:** Full control for all internal users, System and integration testing, (no state) → Waiting for planning

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)			
v 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)			
v 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

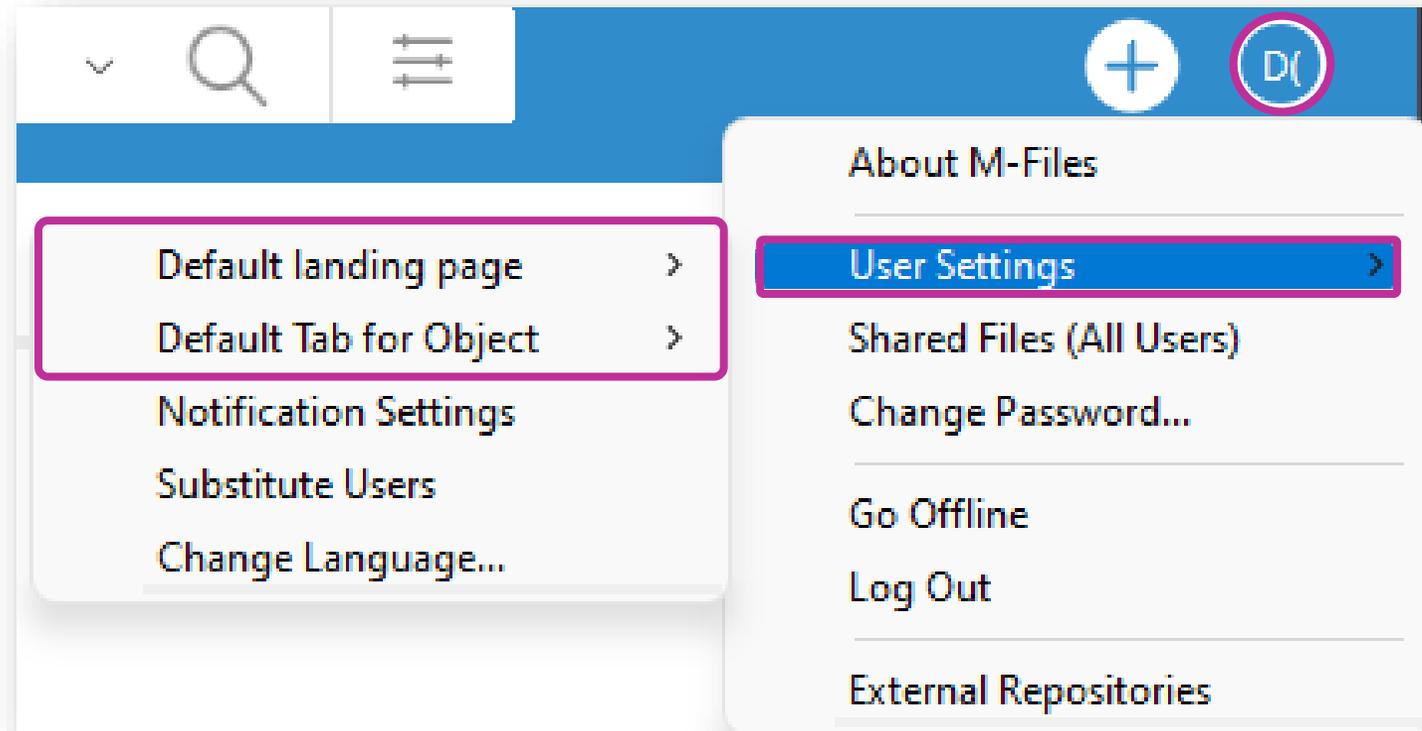
VERSION 4.0
DECEMBER 12, 2020



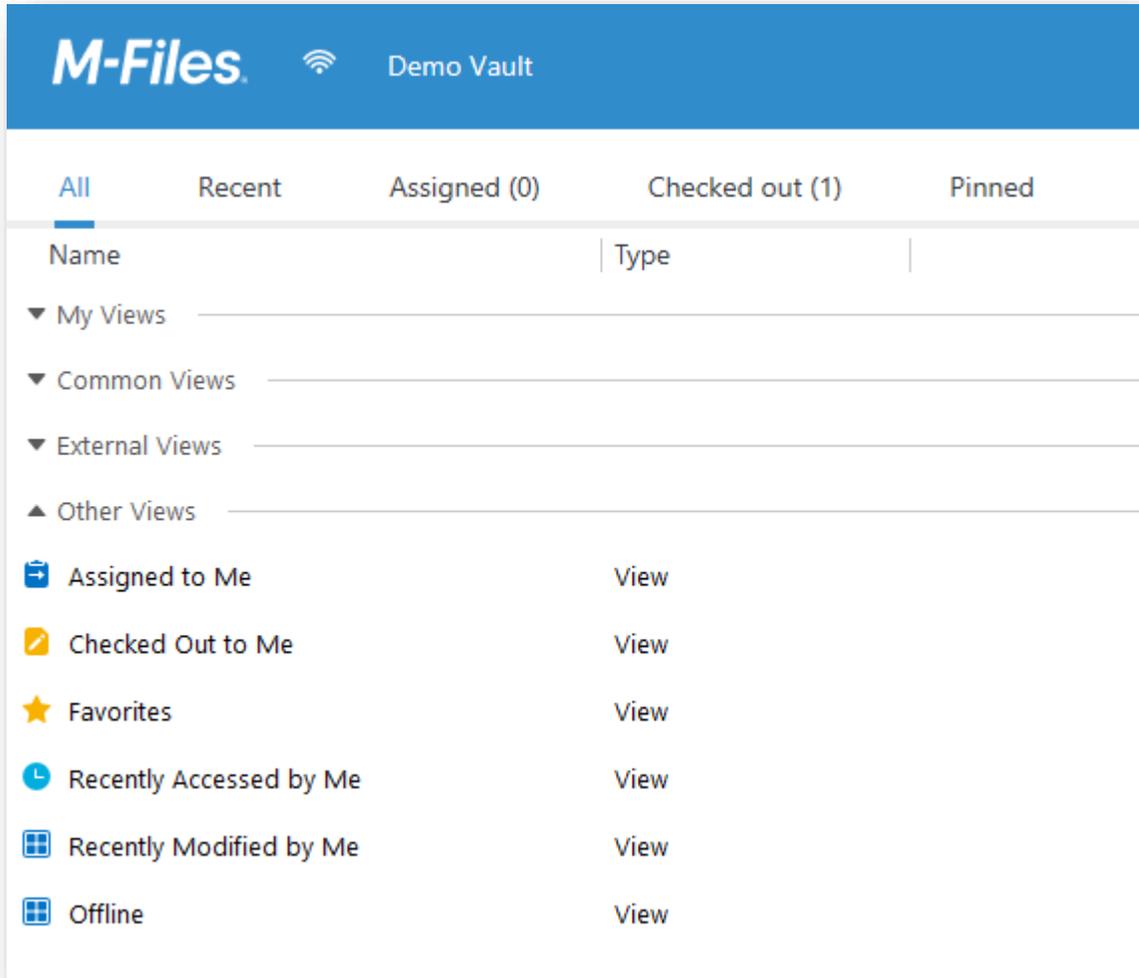
PROJECT MANAGEMENT PLAN
AUSTIN DISTRICT REDEVELOPMENT

Metadata Preview

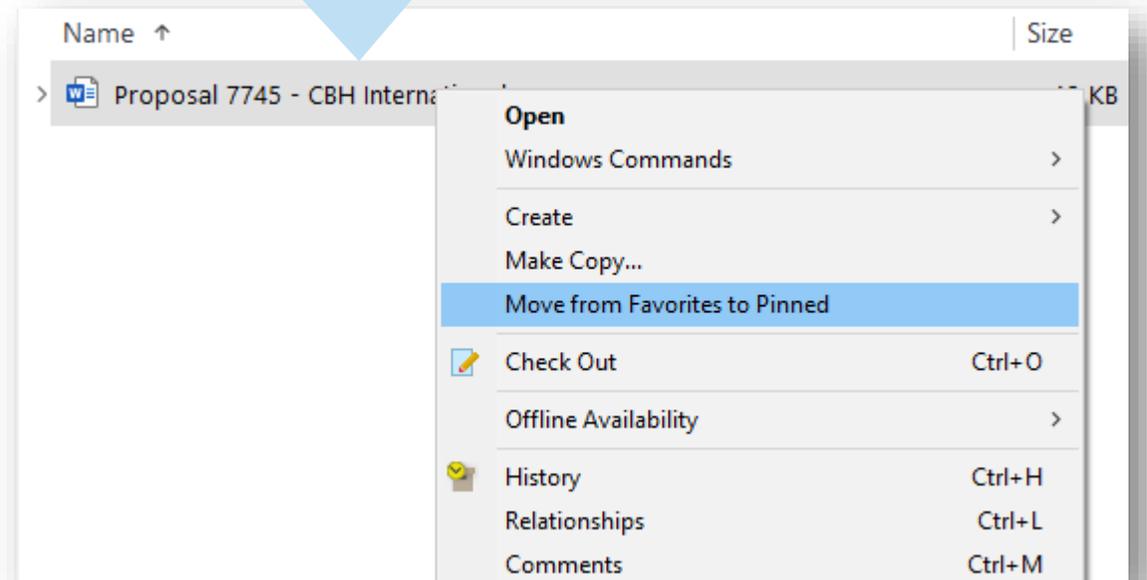
USER SETTINGS: DEFAULT LANDING PAGE AND TAB FOR OBJECT



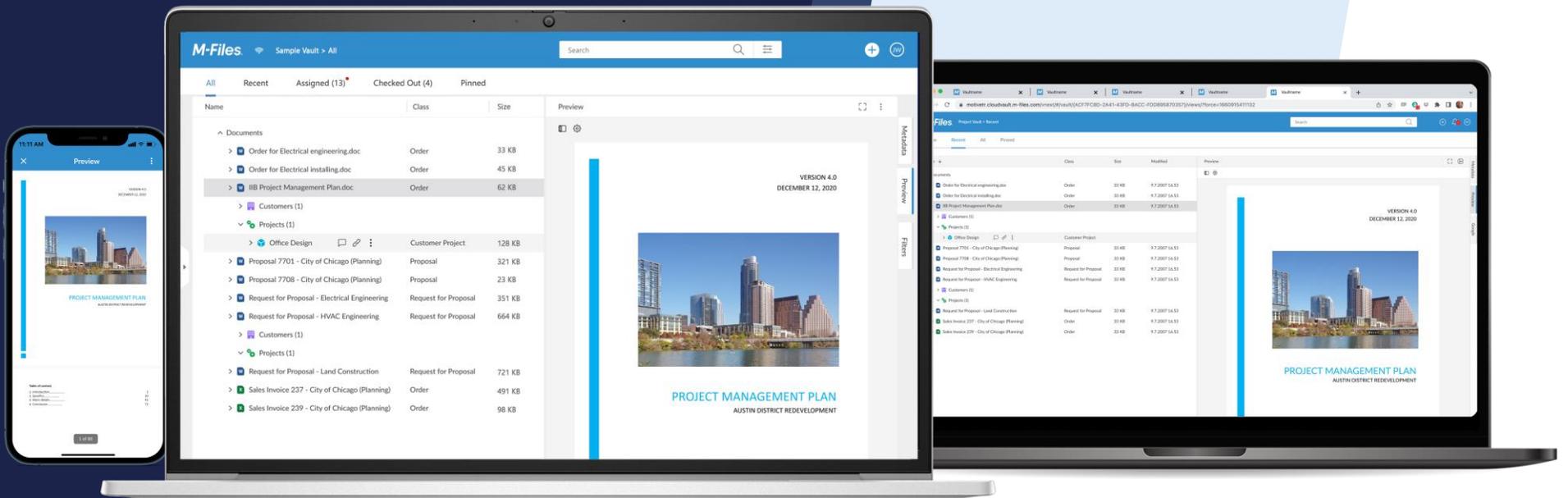
FAVORITES TO PINNED TAB



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



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

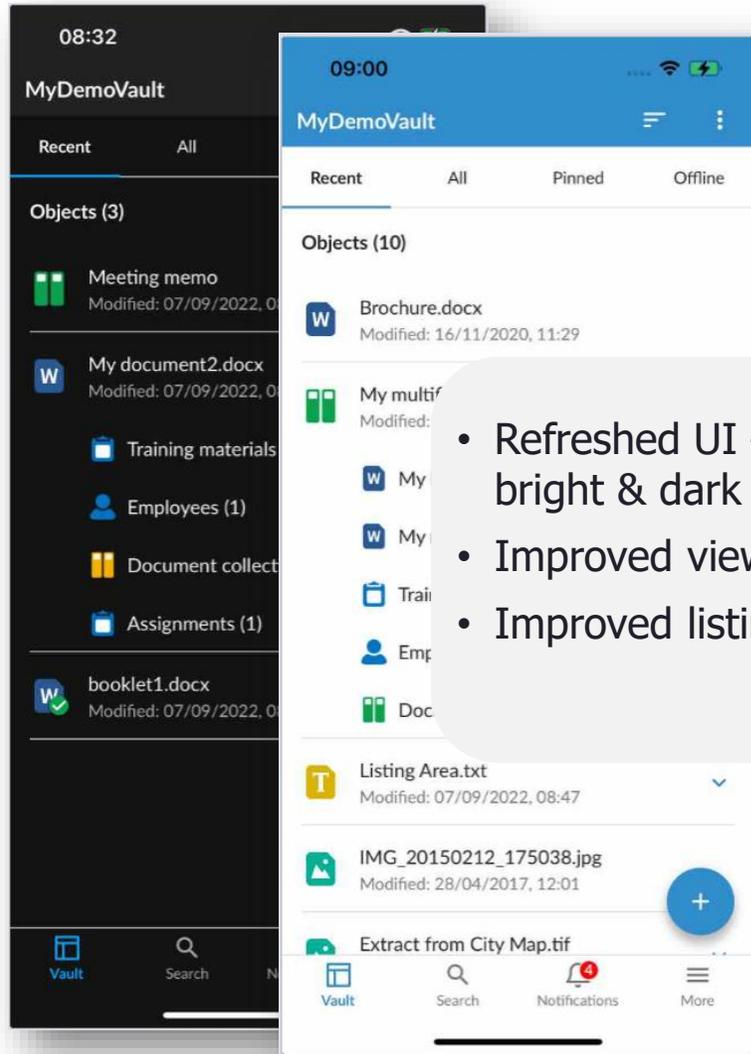


M-Files Home Motive Tampere > Recently Accessed by Me Search + 9 Profile

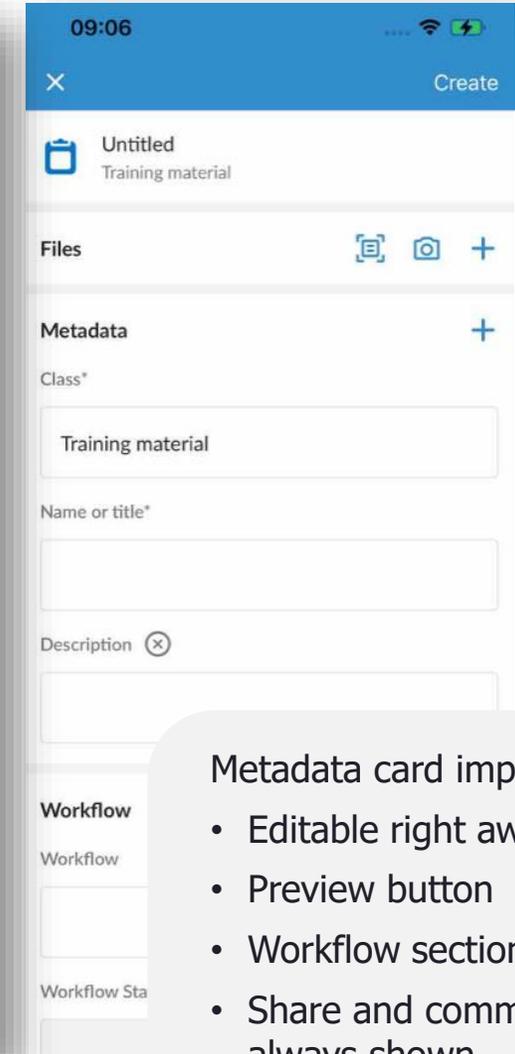
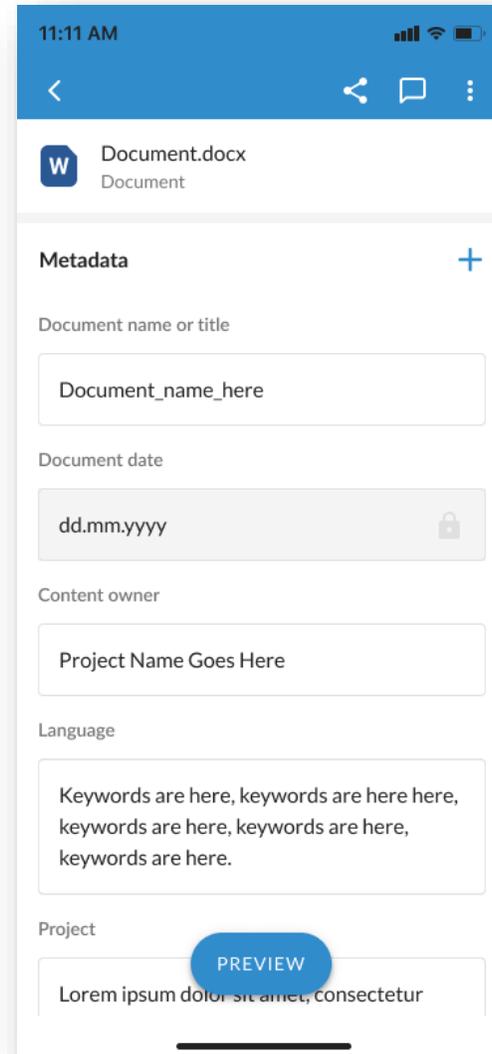
Recent All Pinned

Name	Size	Metadata	Preview
▼ Objects (1-50 of 61)		<p>Desktop UI Refresh - CS Org Assets (Internal) Document</p> <p>ID 409533 Version 17</p> <p>Class* Other Marketing Material Name or Title* Desktop UI Refresh - CS Org Assets (Internal) Language English Document Date 9/16/2022 Account <input type="text"/> Media (Advertising) <input type="text"/> Media Name <input type="text"/> Keywords Product Marketing, Desktop UI Refresh, Product Launch Description <input type="text"/> Additional contribut... <input type="text"/> Content Owner <input type="text"/> Add property</p> <p>Created 9/16/2022 6:44 PM Kelly Revilla Last Modified 9/20/2022 7:51 PM Kelly Revilla</p> <p>Permissions <input checked="" type="checkbox"/> Full control for all internal users Workflow <input type="text"/> State transition <input type="text"/></p> <p>Save Discard</p>	<p>View Edit</p> <h2>Enhanced user interface for an effortless document management experience</h2> <ol style="list-style-type: none">1. Main Navigation Better visibility with a simplified navigation panel view giving you access to choose your desired default view.2. Pinned View We strengthened our pinned view giving it a new location and grouping functionality for a smarter way to organize your vital documents.3. Search Bar Faster way to navigate M-Files with an easier way to locate our search bar and create button.4. Panel Tabs Cleaner design to navigate through your documents' information by repositioning the right panel tabs vertically on the right.

M-FILES MOBILE UI REFRESH (IOS):



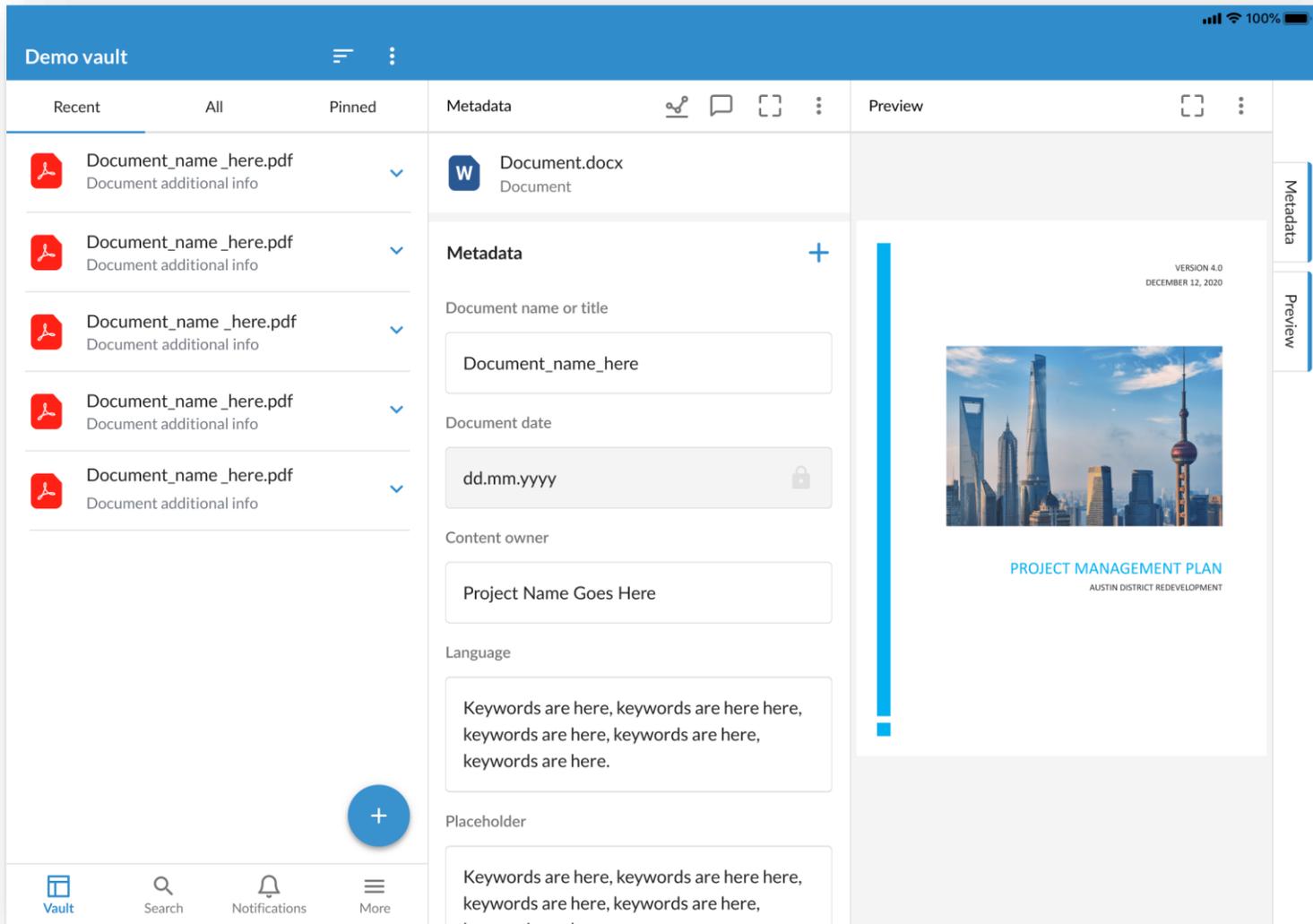
- Refreshed UI – Both bright & dark themes
- Improved view navigation
- Improved listing area



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!