

M-Files 10.0 New Features and Enhancements

Applies to M-Files 10.0 Beta 2

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1. Major new features and enhancements

M-Files enterprise content management (ECM) solutions transform how businesses manage, secure and share information with a unique metadata-driven approach that organizes and processes document and other content based on *what* it is, rather than *where* it is.

Thousands of businesses in over 100 countries use M-Files on-premise, in the cloud or in hybrid environments to improve productivity and quality, and to ensure compliance with industry regulations and standards. M-Files is available in 24 languages and is in use at leading companies such as AstraZeneca, SAS, Securitas and EADS.

M-Files 10.0 offers a variety of new features and enhancements to increase performance, reliability, productivity and efficiency, including:

- ✓ A new and more intuitive user interface for all platforms, including Windows, Web and Mobile Access.
- ✓ A redesigned metadata card with a new interface that makes entering and editing metadata more intuitive, saving documents and other content easier and faster, and provides enhanced support for electronic forms.
- ✓ Improvements to M-Files Mobile Access, such as enhanced support for iPhone, iPad, Android and Windows Phone devices and tablets. A new and optimized mobile user experience provides easier and more instinctive navigation, improved task management with support for electronic signatures, and more.
- ✓ Metadata structure replication that allows metadata structure to be easily applied to multiple vaults to support interaction and cooperation between vaults in a variety of deployment scenarios.
- ✓ The ability to create a separate development vault environment for metadata structure testing and QA purposes prior to production use.
- ✓ Numerous enhancements to M-Files Web Access, including improved support for different operating systems and browsers.
- ✓ A number of improvements to the UI Extensibility Framework enabling rich and comprehensive customization of the M-Files user interface.
- ✓ Enhanced integration with other business systems, including SharePoint, and a variety of CRM and ERP solutions, such as Microsoft Dynamics and Salesforce.
- ✓ Optimized support for the Windows Azure cloud platform providing superior cloud and hybrid cloud performance and reliability.
- ✓ A new M-Files Cloud Vault Subscription Management Portal providing easy-to-use enhancements that enable administrators to add new licenses and users, change license types and user details, reset passwords, and more.
- ✓ Numerous other user interface enhancements and usability improvements that deliver a simpler and more efficient user experience.

Contact us

Please contact an M-Files Partner or our sales team for a custom online or on-site presentation of M-Files tailored for your business needs! By email, you can reach us at sales@m-files.com. Technical support personnel answers questions sent to the address support@m-files.com or at <http://support.m-files.com>.

You can also contact our sales or technical services by calling us:

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Trial version

You can test our product right away for free! Just visit www.m-files.com/try for a free 30-day trial of the M-Files software.

Thanks for your interest and support! If you have already chosen M-Files, or if you're still considering it, we're confident that you will be delighted with the impact M-Files will have on your business, and look forward to working with you in the future! Please do not hesitate to contact us with any questions. To learn more, please visit the M-Files web site at www.m-files.com.

2. System requirements and upgrading to version 10.0

2.1 System requirements for M-Files 10.0

M-Files is compatible with both 32-bit and 64-bit Microsoft Windows operating systems. Please note that the 32-bit and 64-bit versions have separate installation programs.

M-Files software can be installed on computers running on one of the following operating systems:

- | | |
|-----------------------|---|
| • Windows 8 | • Windows Server 2008 R2 |
| • Windows 7 | • Windows Server 2008 |
| • Windows Vista | • Windows Server 2003 Service Pack 2 or later |
| • Windows Server 2012 | |

M-Files supports both the Workstation or Server versions of the operating system.

Note: M-Files 10.0 Client only works on Windows versions 8, 7 and Vista. Windows XP users can use M-Files 10.0 Server with 9.0 Client.

Note: Ensure that the target computer has at least 200 MB of free space for the M-Files Client installation. Ensure that the target computer also has at least 1 GB of free space for the M-Files Server installation. The space required by the document vault depends on the number and size of the documents and other objects to be managed.

Mac and Linux users can access M-Files via popular web browsers using M-Files Web Access.

For more information on technical specifications, please refer to [M-Files Technical Data Sheet](#).

2.2 How to upgrade M-Files

M-Files customers with an active Upgrades and Support Subscription have the right to update the M-Files software at no charge. If you need support for the installation or update, or if you want to gain as much benefit as possible from the features in M-Files 10.0 for your company's specific needs, our consultants' services are available. Our customer service staff is also available to assist with licensing and subscription matters.

Upgrade instructions

http://www.m-files.com/eng/res/How_to_upgrade_M-Files_software.pdf

3. New and more intuitive user interface

Note: The UI of the M-Files Client software can still slightly change in the 10.0 production release.

The new version of M-Files comes with a refreshed look and feel. The new layout is designed to make M-Files even easier to use than before!

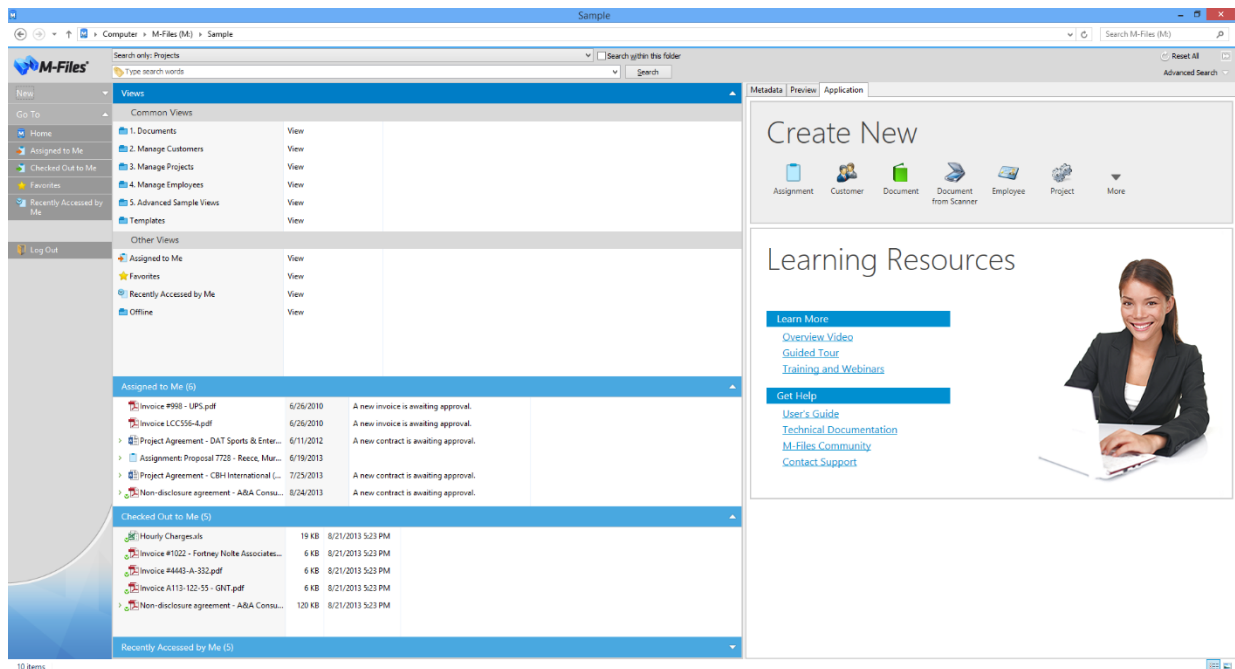


Image 1: The new client layout

The new *Home* view reveals more content to users than ever. It is now possible to directly see your checked out and recently accessed documents immediately after starting M-Files.

Creating new items is much easier from the *Home* view. You can also access M-Files learning and help resources directly from the *Learning Resources* section.

4. New metadata card

Note: The user interface and features of the metadata card may still change slightly in the 10.0 production release.

A redesigned metadata card with a new interface makes editing metadata more intuitive, as well as saving documents and other data easier and faster. In addition, the new metadata card provides enhanced support for workflows, process automation and electronic forms.

Note: The *Notifications* and *General* tabs have been removed. Information that had been included on the *General* tab is now integrated into the new *Metadata* tab.

4.1 Visual changes

The metadata card is now embedded in the M-Files Client UI in a manner that enables editing of properties without having to open additional windows. Properties are also realigned in the metadata card making it easier to quickly read key object metadata.

The screenshot shows the M-Files Client UI. At the top, there's a document header with a PDF icon, the title 'Non-disclosure agreement - A&A Consulting (AEC) (6/2013)', and a notification bubble with '0'. Below the header, it says 'Document ID 486 Version 5' and 'Created 8/6/2012 1:14 PM Andy Nash Last modified 8/21/2013 4:41 PM Andy Nash'. A blue bar contains icons for flags, stars, settings, and a triangle. The main area displays a list of metadata properties:

Class*	Contract or Agreement
Agreement title*	Non-disclosure agreement - A&A Consulting (AEC) (6/2013)
Agreement type*	Non-disclosure agreement
Owner*	Andy Nash
Document date*	6/22/2013
Effective through	6/22/2013
Customer*	A&A Consulting (AEC)
Contact person	Jeff Smith
Project	Austin District Redevelopment
Keywords	NDA
Description	---
Assignment description	A new contract is awaiting approval.
Deadline	8/24/2013
Add property	

At the bottom, there's a light blue bar with a lock icon and the text 'Custom'. To the right, it says 'Contract Approval Workflow' and 'Waiting for Approval' with a yellow arrow icon.

Image 2: The new metadata card in view mode

The Metadata card has two modes: *view mode* and *edit mode*. In the view mode, users can quickly see the metadata associated with the selected item. As the name implies, the edit mode allows users to directly edit object metadata, and is activated by clicking directly on an editable metadata property. The blue bar in the metadata card turns orange in edit mode indicating that the user has unsaved changes. Once the changes are saved or discarded, the bar turns blue again.

4.2 Metadata card position on the UI

By default, the metadata card is positioned on the right side of the user interface. The new location enables more metadata to be displayed on one screen as the card gets more real estate. In addition, the size of the metadata card can be adjusted according to different user needs and preferences.

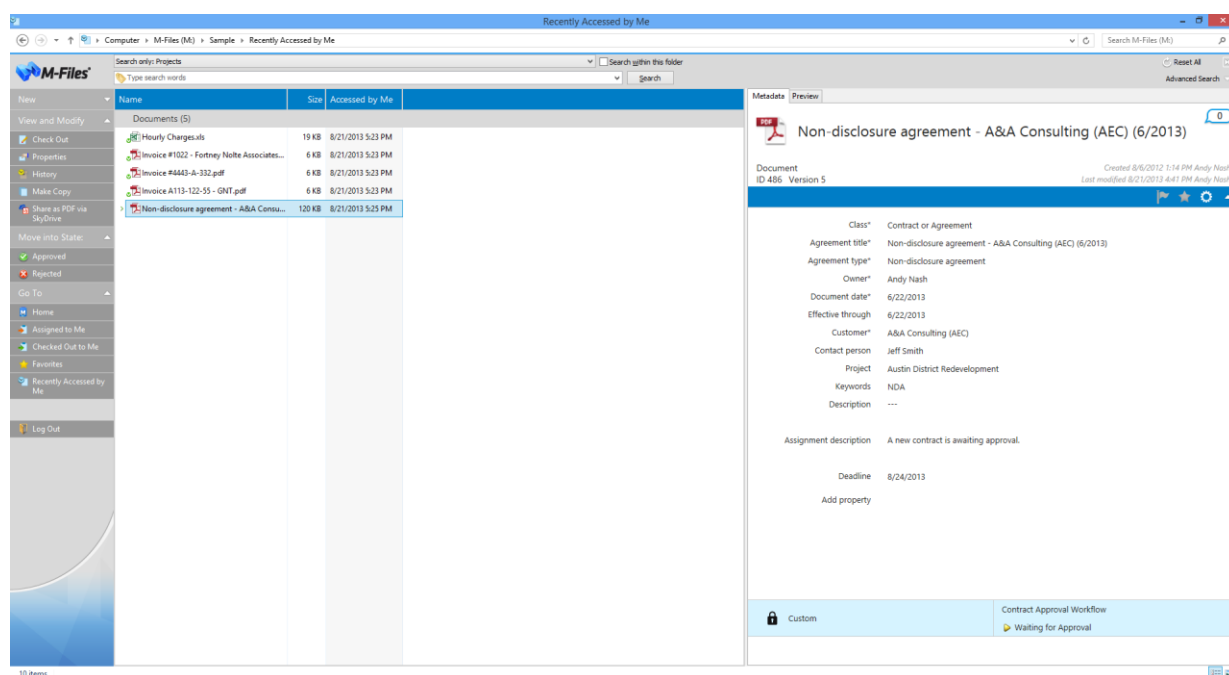



Image 3: The right-side position of the new metadata card in the user interface

In some cases, such as when working with views that show multiple columns in the listings, or when working with a smaller screen, it makes more sense to show the metadata card in the bottom pane. You can change the position of the metadata card to the bottom pane by clicking the  icon on the metadata card and selecting **Toggle Metadata Card Location**.

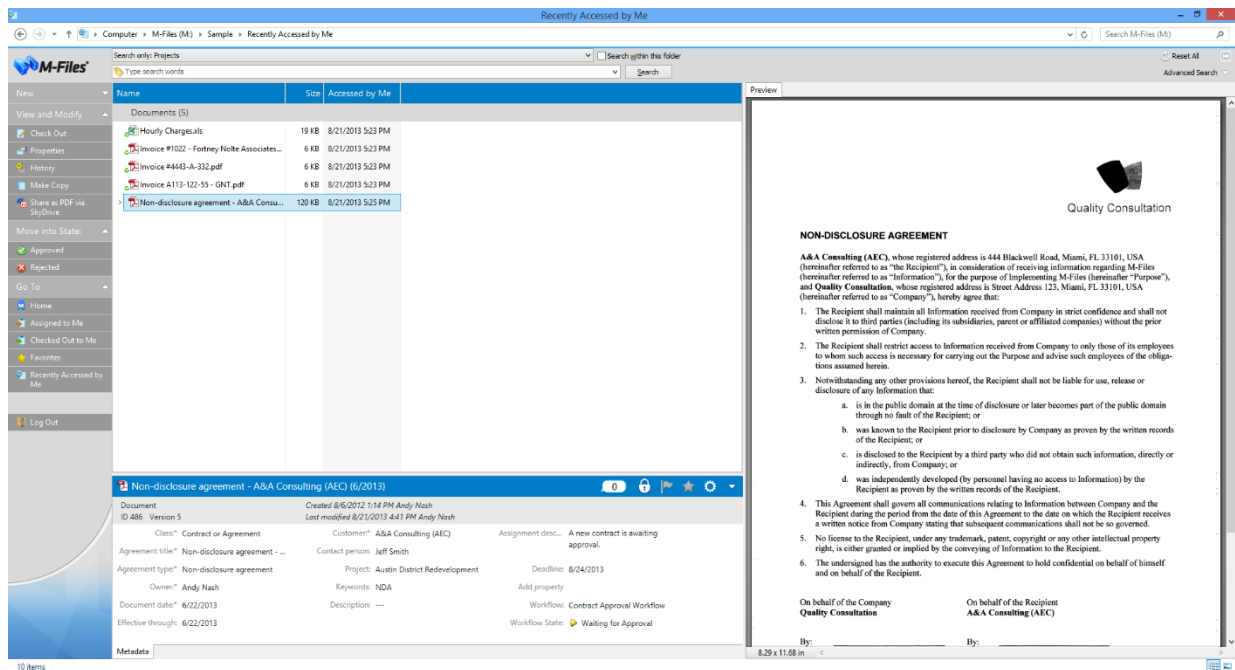


Image 4: Metadata card at the bottom of the user interface

4.3 Creating new documents

M-Files 10.0 introduces a new document creation wizard to help you select the right template and class for a new document.

After selecting **New Document** from the task area, you can proceed by selecting a document template from the list. You can also search for templates by entering a search term. The search displays all templates and file formats that match the search criteria, and highlight the search term in the results.

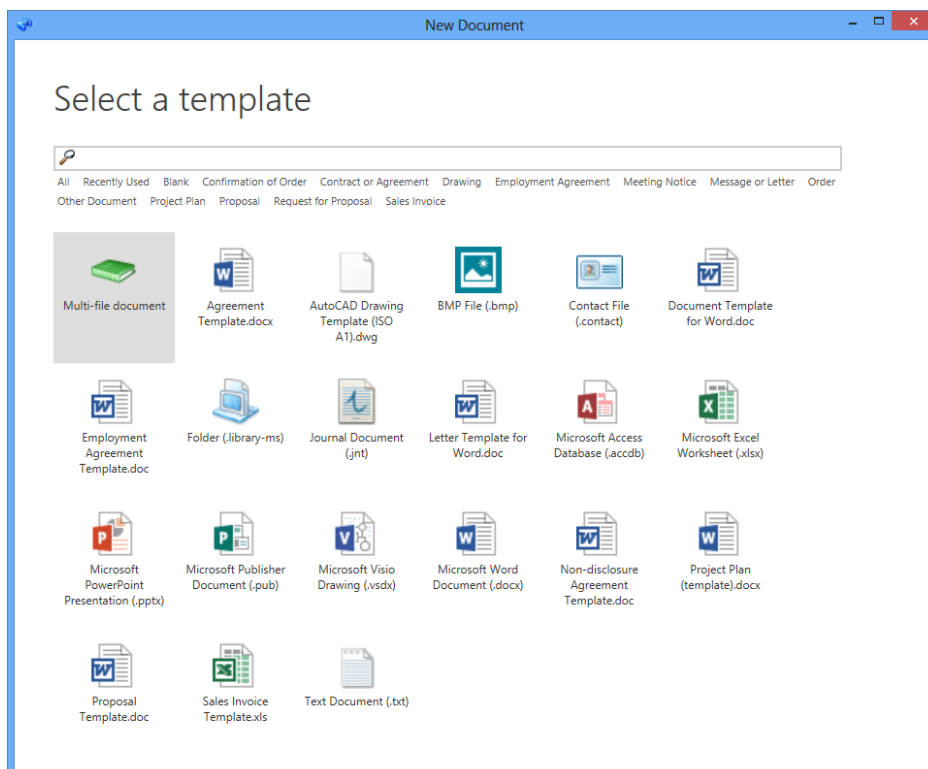


Image 5: New document creation interface

Selecting *All* displays all templates and file formats that are defined for the current vault. The *Recently used* option shows all templates you have recently accessed. Recently used templates are also shown by default when you open the template selection wizard. The *Blank* option displays all file formats that can be selected for a new document.

These predefined options are followed by a list of classes that can also be used for selecting a template. Selecting a class displays the templates that are available for that class.

After you have selected a template or a blank document, the metadata card for the new document opens and you can start editing the document's properties.

4.4 Creating new objects other than documents

When you start creating any object other than a new document, the metadata card for the new object is displayed. The new metadata card provides the same functionality as the metadata card in previous M-Files releases.

The screenshot shows a 'New Customer' metadata card. At the top, there's a header with a user icon and the name 'A&A Consulting'. Below this, the word 'Customer' is displayed. A settings gear icon is visible on the right. The main area contains a list of properties: 'Class*' (Customer), 'Customer name*' (A&A Consulting), 'Address (line 1)' (empty text box), 'Address (line 2)' (---), 'City' (---), 'State/province' (---), 'ZIP/postal code' (---), 'Country' (---), 'Telephone number' (---), and 'Web site' (---). An 'Add property' button is at the bottom of this list. Below the properties, there's a section for permissions with a lock icon and the text 'Full control for all internal users'. At the bottom, there's a checkbox labeled 'Check in immediately' which is checked. Finally, 'Create' and 'Cancel' buttons are located at the bottom right.

Image 6: New object creation via the new metadata card

After you have entered values for mandatory fields (those marked with an asterisk), the object can be saved by selecting the **Create** button. Selecting **Cancel** deletes the newly created object.

The *Check in immediately* option is selected by default to ensure that the new object is saved to the repository immediately after selecting **Create**. You can alternatively keep the object checked out to you if you plan to add additional metadata before saving it to the vault.

4.5 Editing metadata of an existing object

You can edit the metadata directly by modifying the property values in the metadata card. In addition to being able to directly edit property values, you can add or remove properties, change workflow-related information and modify permissions of the selected item(s).

Clicking on a property in the metadata card activates the edit mode, which displays the *Save* and *Discard* options at the bottom of the page. Clicking the **Save** button saves the changes, creates a new version of the object and returns the metadata card to view mode. Selecting **Discard** returns the metadata card to view mode without saving any modifications.

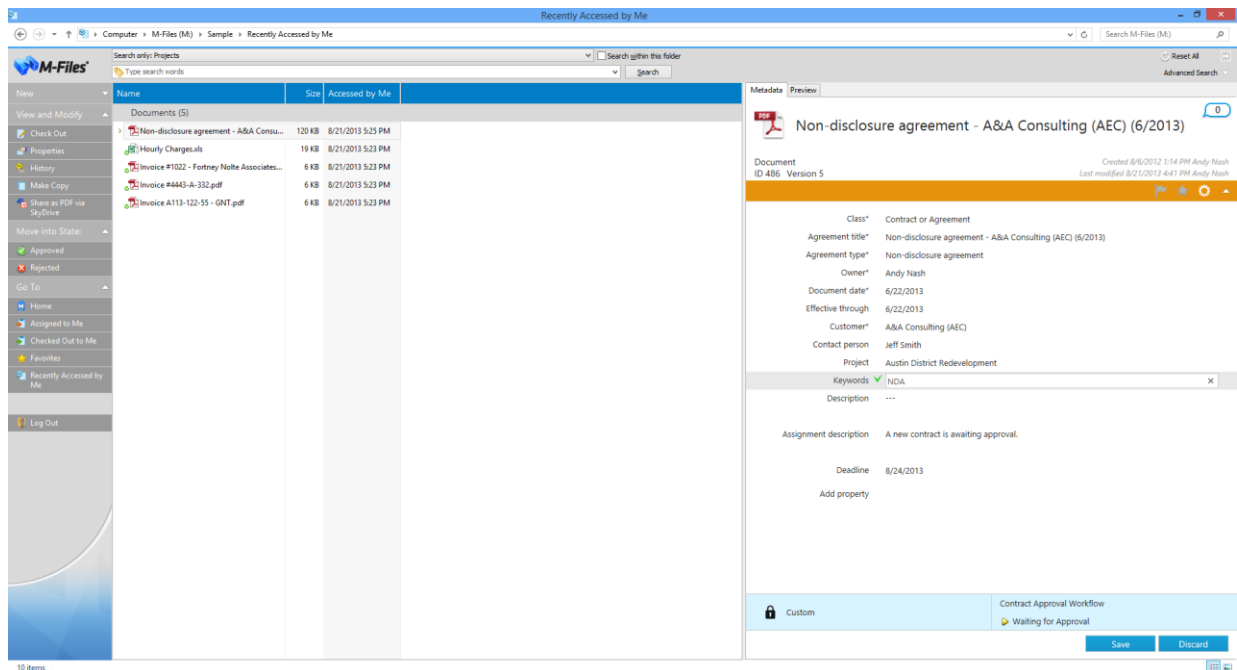



Image 7: The new metadata card in edit mode

4.6 "Popping out" the metadata card

You can detach, or "pop out," the metadata card in a separate window by pressing the  icon on the metadata card and selecting **Pop Out the Metadata Card**. This allows you to view and edit several metadata cards simultaneously, as well as to view document metadata and the pre-view window side-by-side.

Once the metadata card has been detached from its default position, it can be operated just like any standard window in the user interface.

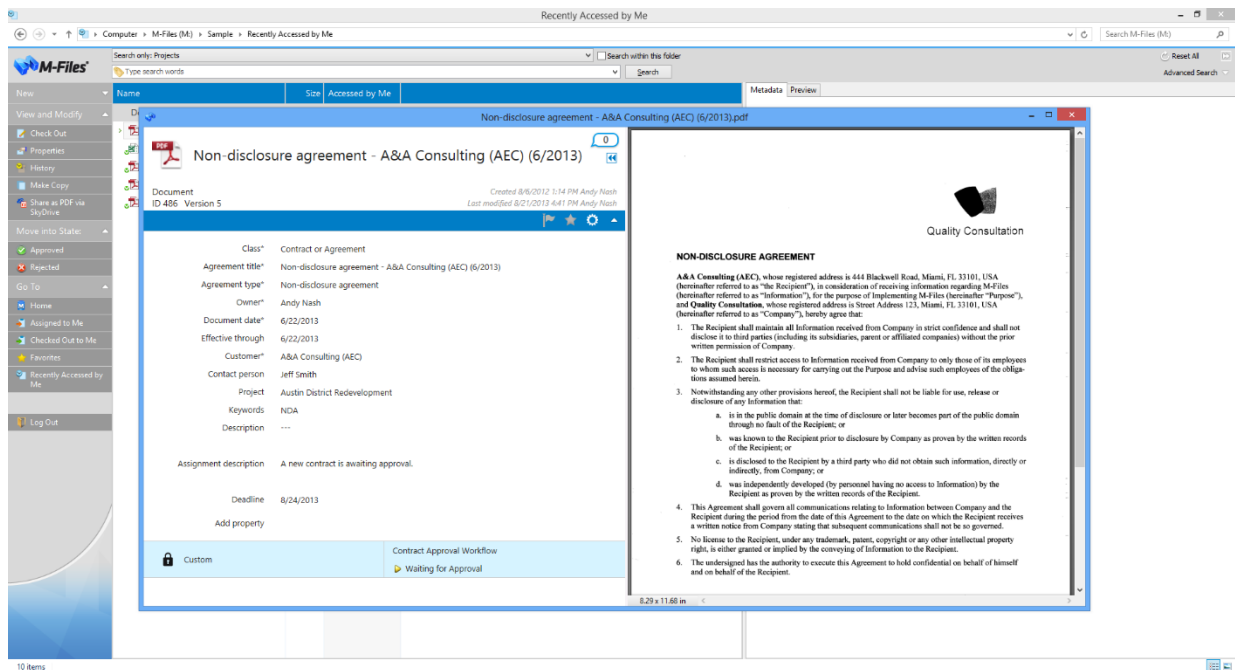


Image 8: Metadata card in a separate window with preview

4.7 Toolbar

The toolbar appears when you edit fields in the metadata card. It displays all the available functions for the field in question. The available functions are: *add field*, *remove field*, *refresh*, *add value*, and *edit*.

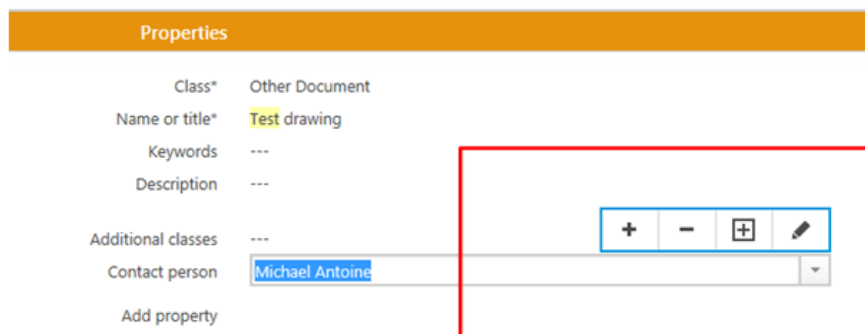



Image 9: The metadata card toolbar

4.8 Comments view

The comments view can be accessed by selecting the  icon from the metadata card. This view presents all the comments related to the file in a chronological order, as well as the option to add new comments.

Selecting the  icon from the comments view brings you back to the properties view.

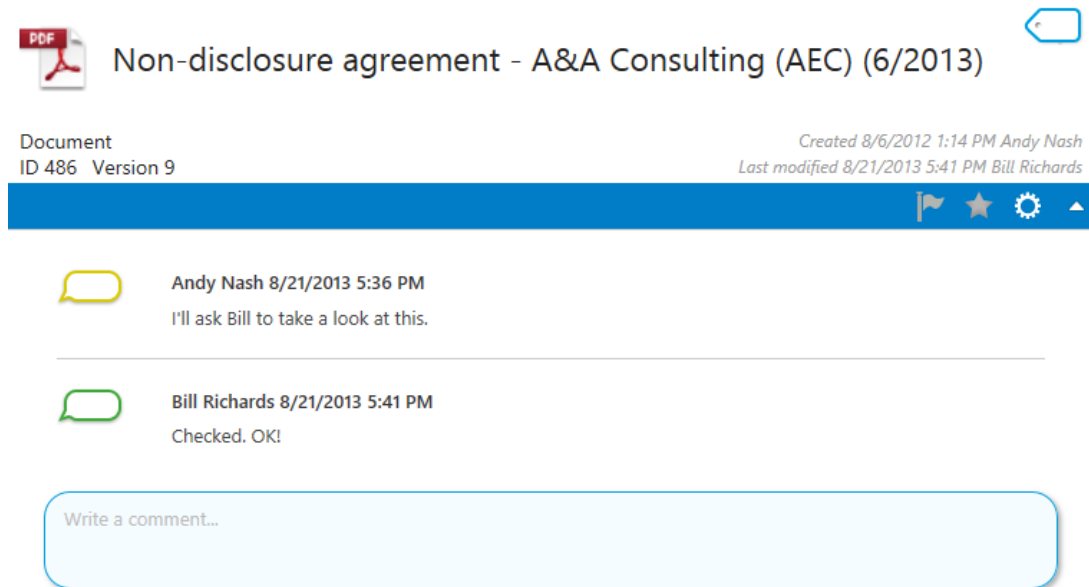



Image 10: The comments view

4.9 Adding objects as favorites

You can add objects as favorites by pressing the  button on the metadata card. Favorite objects are quickly accessible through the *Favorites* view in the M-Files Client, Mobile Access and Web Access. To remove an object from favorites, simply press the icon again.

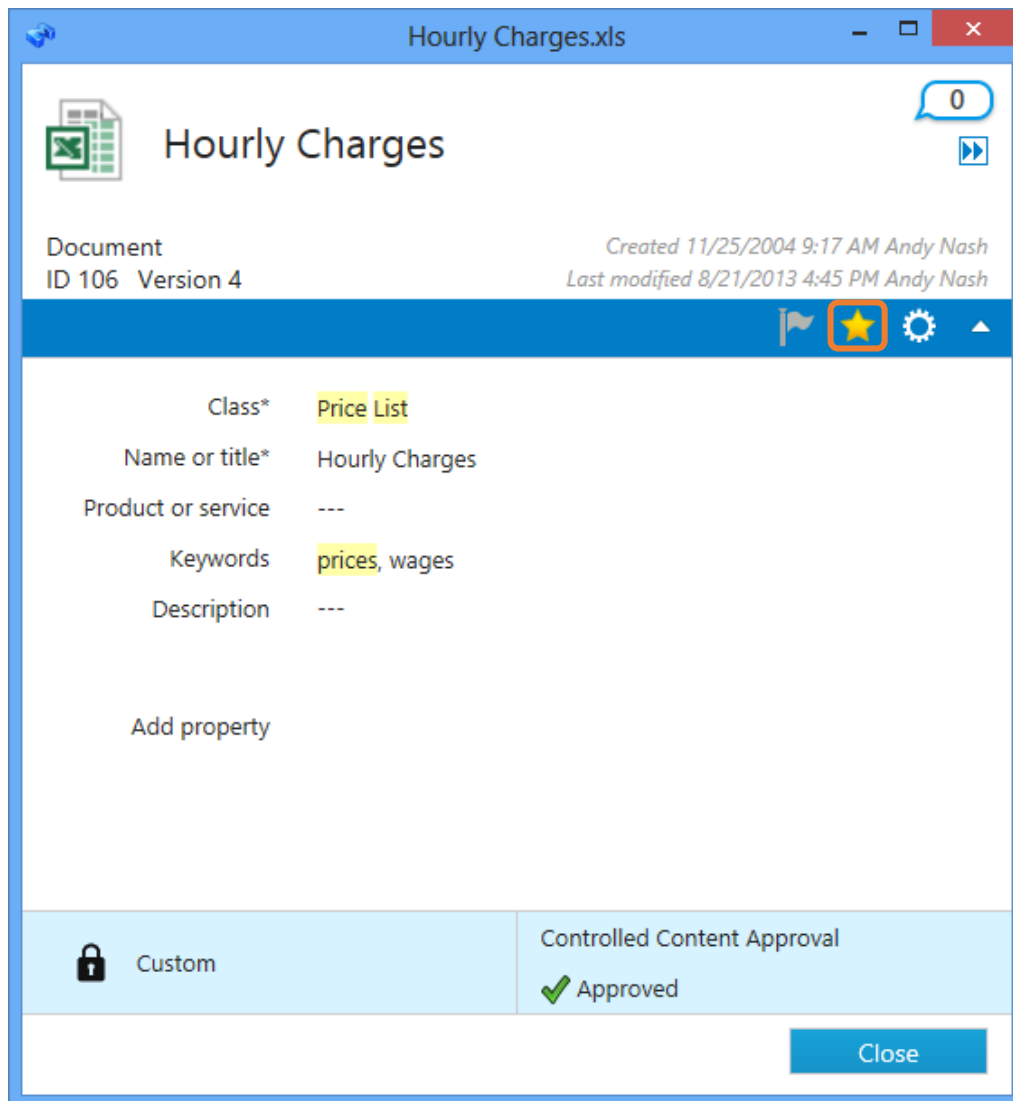

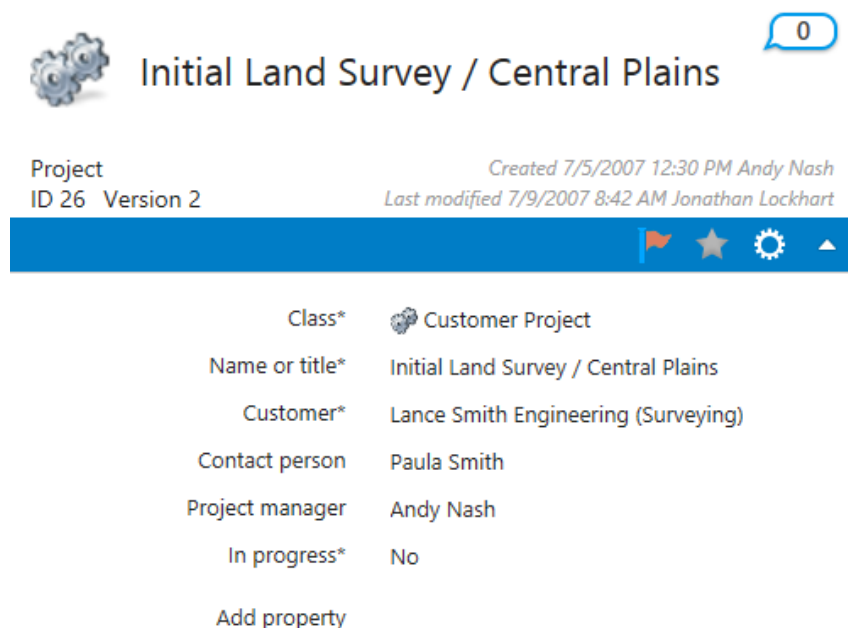


Image 11: Add to Favorites

4.10 Following objects

You can follow documents and other objects to stay on the top of the changes happening in the vault. You can follow a specific document, for example a price list, to get notified by e-mail whenever that document is modified.


Alternatively, you can follow any non-document object too, such as a project. In this case you are notified not only about changes to the project object itself but also about new and changed documents associated with the followed project. To follow an object, simply click the  icon on the metadata card.



Initial Land Survey / Central Plains

Project
ID 26 Version 2

Created 7/5/2007 12:30 PM Andy Nash
Last modified 7/9/2007 8:42 AM Jonathan Lockhart

Class*  Customer Project

Name or title* Initial Land Survey / Central Plains

Customer* Lance Smith Engineering (Surveying)

Contact person Paula Smith

Project manager Andy Nash

In progress* No

Add property

Image 12: Follow the object

If you followed a non-document object, a new notification rule is added automatically and can be configured by the user (see **Settings > Notification Settings**).

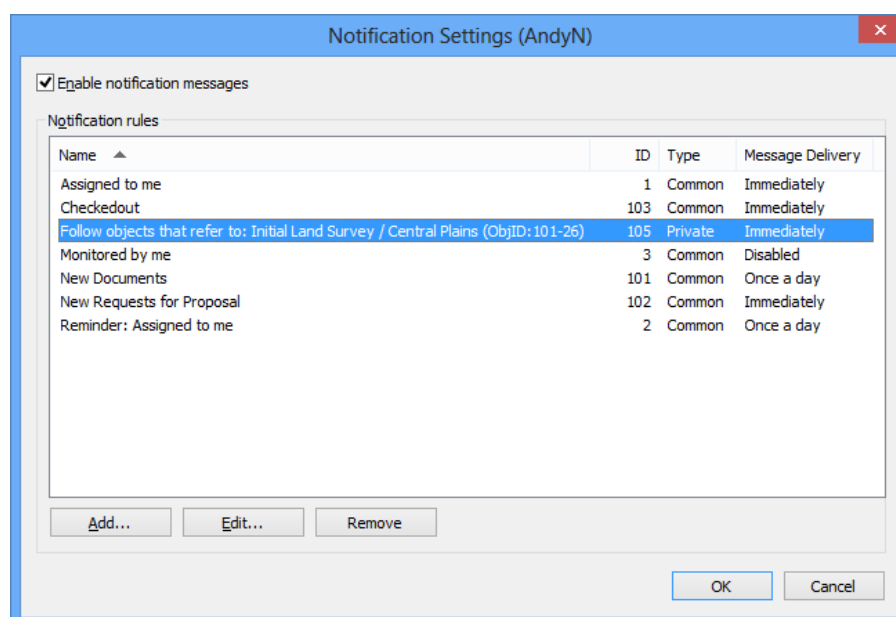


Image 13: Notification settings

You can modify the notification rule properties to change the message delivery setting to make M-Files send you a daily digest message instead of a separate notification for each event.

Notification Rule Properties - Follow objects that refer to: Initi...

General

Name: Follow objects that refer to: Initial Land Survey / Ce

Message delivery: A separate notification message for each event

☒ Private rule. Applies to the current user only.

☐ Common rule. Applies to the specified recipients only.

Recipients...

Filter

'Project' = 'Initial Land Survey / Central Plains'

Define Filter...

Event subscriptions

Event	Notify
New document or other object	<input checked="" type="checkbox"/>
Document or other object changed	<input checked="" type="checkbox"/>
The state of a document or other object changed	<input type="checkbox"/>
Document or other object matches the conditions of the filter	<input type="checkbox"/>
Checkout	<input type="checkbox"/>
Check-in	<input type="checkbox"/>
Undo checkout	<input type="checkbox"/>
Rollback	<input type="checkbox"/>
File downloaded	<input type="checkbox"/>
Document or other object deleted	<input checked="" type="checkbox"/>
Document or other object destroyed	<input checked="" type="checkbox"/>
One version of a document or other object destroyed	<input type="checkbox"/>

☒ Exclude notifications of events caused by the current user

OK Cancel Help

Image 14: Notification rule properties

4.11 Customizing the metadata card with HTML

You can also build your own HTML-based applications to be used in the area reserved for the metadata card. For example, when using M-Files as a CRM system, the user interface can be customized to show customer-specific information on the right side of the layout.

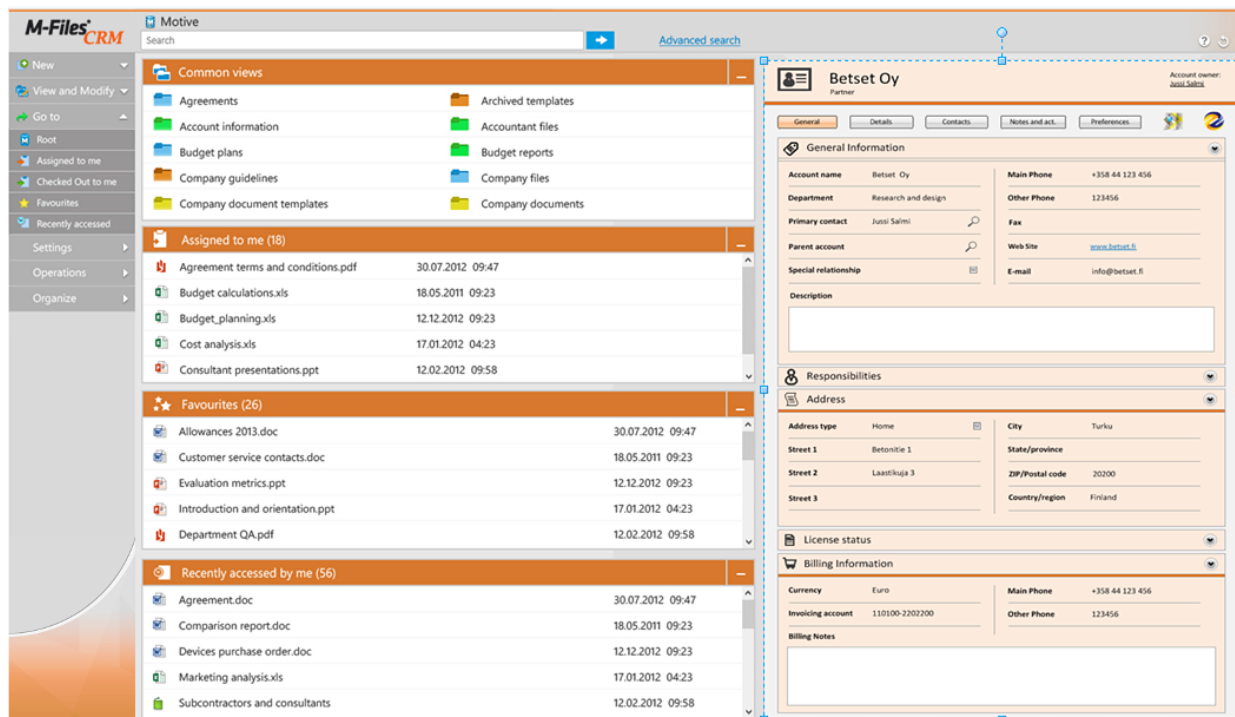


Image 15: HTML-based customer card in M-Files CRM

Please navigate to http://www.m-files.com/UI_Extensibility_Framework for additional information on how to customize the HTML-based metadata card.

5. Improvements to M-Files Mobile Access

Note: The user interface and features of M-Files Mobile Access are not yet final in the Beta stage and the M-Files Mobile Apps are published later in autumn 2013.

M-Files Mobile Access has been redesigned to better meet the requirements of mobile users. M-Files Mobile Access enables users to conveniently access content in M-Files with tablets and smartphones; it also enables users to participate in task-oriented processes like workflow and commenting.

M-Files Mobile Access now comes with native support for multiple devices. You can download the M-Files app for iPhone, iPad, Android and Windows Phone from their respective "App Stores" or market places for free! Since the apps are optimized to support the unique features of each platform, the Mobile Access user interface looks slightly different on each.

5.1 M-Files Application for iOS

You can install the M-Files Mobile Access application for iPhone from the App Store. This application adds a shortcut to your vault on the home screen and provides you an iPhone-optimized user experience.



Image 16: The iOS user interface style supports the bottom toolbar, the title area with a display of available functions, and an optimized list layout

5.2 M-Files Application for iPad

The M-Files mobile application for iPad takes full advantage of the tablet device's display size, enabling you to see more information on the go.

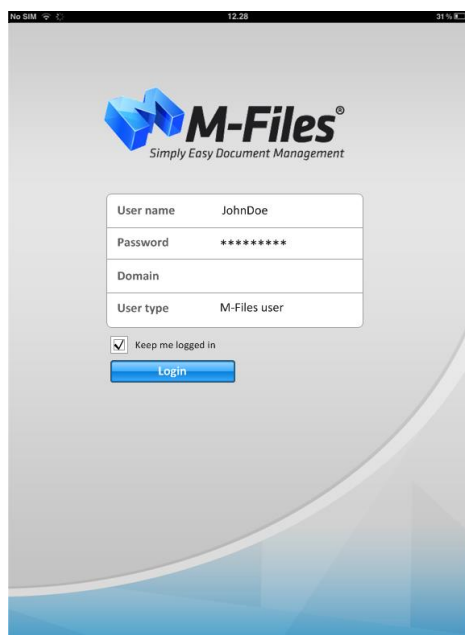


Image 17: The iPad application login page

5.3 M-Files Application for Android

The Android application can be installed from the Android Market. It displays the toolbar at the top of the view and places the menu in the title area.

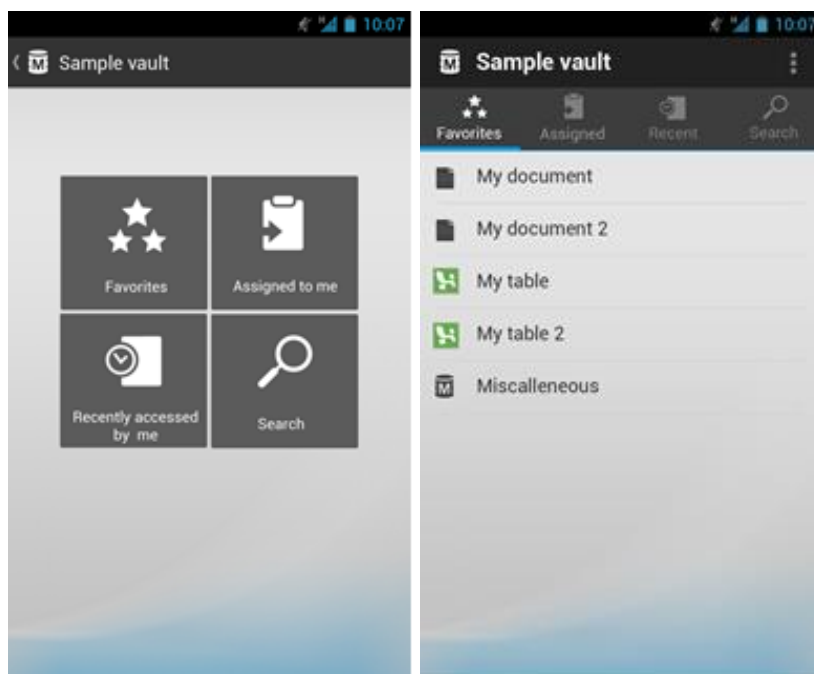


Image 18: The Android user interface has a toolbar at the top of the view, with additional functions displayed in the title area

5.4 M-Files Application for Windows phone

The M-Files mobile application for Windows Phone can be downloaded from the Windows Store. The application takes full advantage of the modern look and feel of Windows 8.

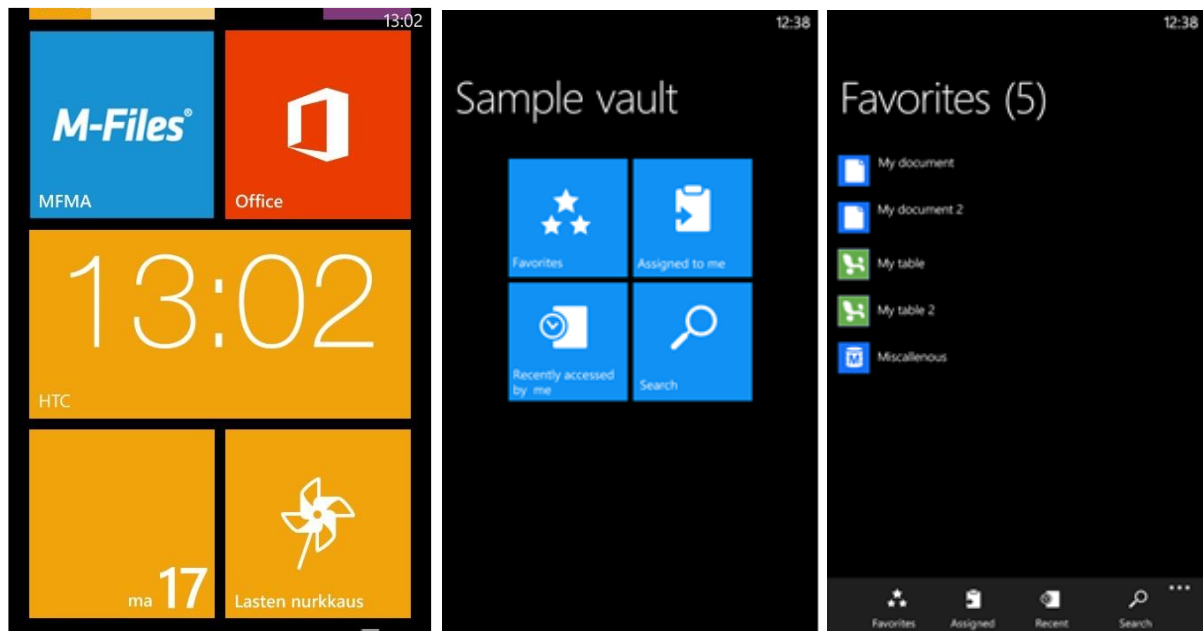


Image 19: Windows phone user interface has the bottom toolbar, and additional functions can be found in the options menu and toolbar

5.5 Electronic signature for workflow state approval

M-Files 10.0 extends support for electronic signing to Mobile Access users as well. With this feature, organizations can implement mobile-friendly workflow and approval processes that comply with regulatory requirements, such as FDA 21 CFR Part 11.

Administrators can configure workflows that require electronic signatures. For instance, it is possible to specify that agreements can only be approved with electronic signatures. In this case, the user is prompted to re-enter their login credentials when approving the agreement.

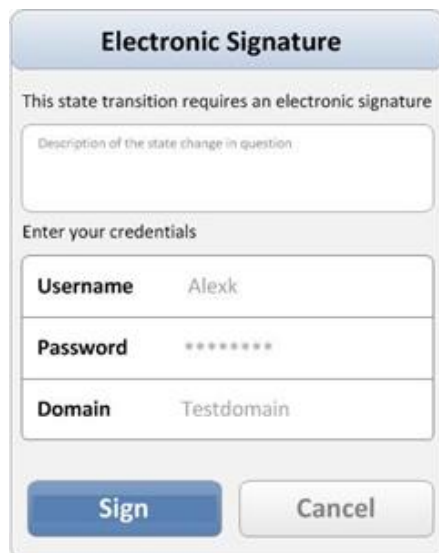
The image shows a dialog box titled "Electronic Signature". Inside the dialog, there is a message "This state transition requires an electronic signature" followed by a text area labeled "Description of the state change in question". Below this is a section titled "Enter your credentials" which contains three input fields: "Username" with the value "Alexk", "Password" with masked characters "*****", and "Domain" with the value "Testdomain". At the bottom of the dialog are two buttons: "Sign" and "Cancel".

Image 20: Electronic signature dialog in Mobile access

Note: The eSigning & Compliance module is required to use this feature.

Electronic signing is available only to users that are logged in with their Windows credentials, and can only be applied to one object at a time.

5.6 "Remember me" functionality

When logging in using M-Files Mobile Access, selecting the *Remember me* option from the login view keeps your session active until you log out from Mobile Access.

6. Metadata structure export and import

In addition to the ability to export content from one M-Files vault to another, it is now possible to replicate metadata structure, including incremental changes, from one vault to another. This allows you to maintain cohesive metadata structure and associated taxonomies in multi-vault environments.

This new capability also allows you to implement an isolated sandbox environment wherein new metadata elements, including workflows, permissions and views can be tested before deploying them to your production environment. You can also export new metadata elements one element at a time from the sandbox vault to the production vault without having to deploy the entire metadata structure in one step, making it easier to review and assess changes to metadata in your production environment.

All metadata structure elements, including classes, class groups, property definitions, named access control lists, object types, value lists, users and user groups, as well as language translations, views, workflows and vault-specific event handlers and scripts can be replicated from one vault to another.

Note: Automatic permissions are always transferred with the associated content.

6.1 Keeping metadata structure synchronized between multiple vaults

Metadata structure export and import can be used for metadata structure replication between two or more existing vaults. This allows you to keep metadata structure and associated taxonomies synchronized between all vaults.

The metadata structure replication process is always unidirectional, meaning that you must always have export and import vaults defined. When replicating metadata structure, it is highly recommended to define a master vault. As with 9.0, the replication of content (i.e., objects, documents and files) is bi-directional.

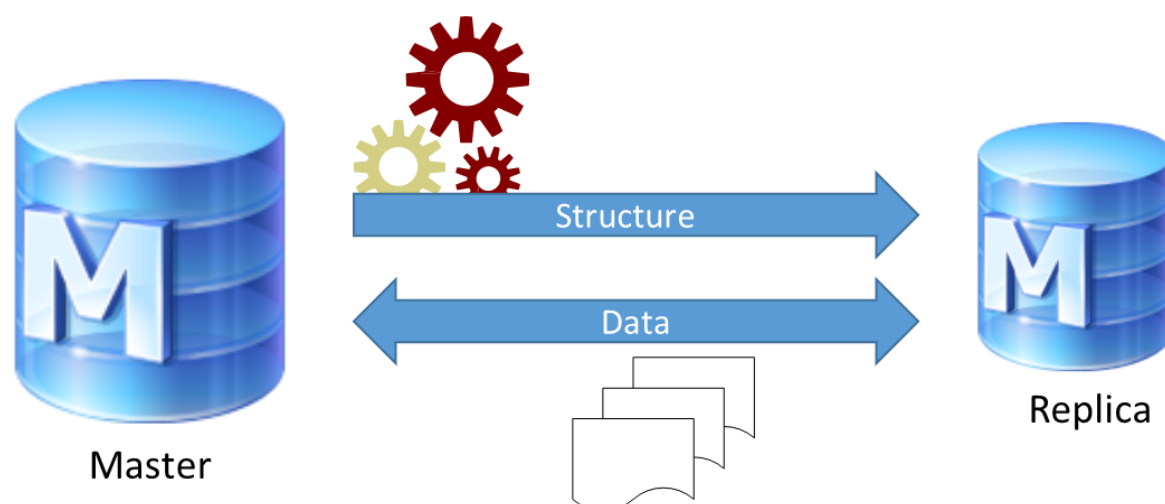


Image 21: Metadata structure replication between two vaults.

6.2 Development-related Features

System administrators can create isolated "sandbox" test environments wherein new metadata elements, in addition to views, translations, permissions and scripts can be tested before deploying them to the master vault in your production environment.

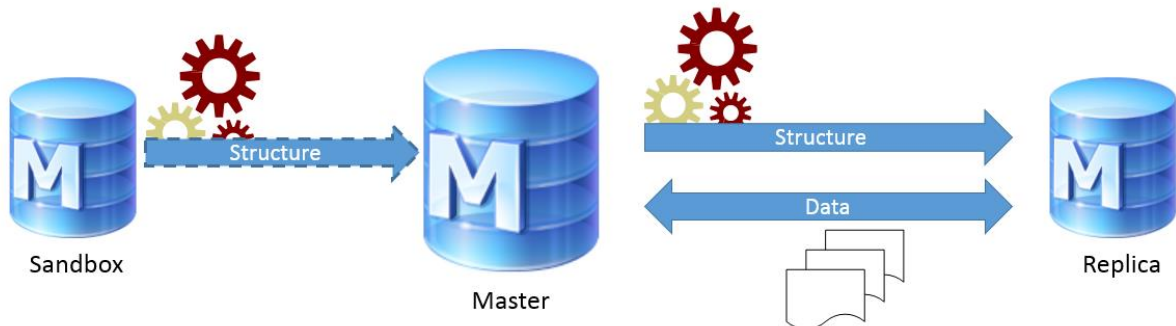


Image 22: Metadata structure replication from a sandbox environment to a production environment

Administrators can choose from a list (see chapter [6.3.1](#)) which parts of the metadata structure are to be replicated.

6.3 Define the metadata you want to export and import

The metadata exporting and importing dialogs can be accessed through the M-Files Server Administrator tool.

6.3.1 Exporting metadata structure

In the M-Files Server Administrator tool you can choose the vault you want to use as the source for metadata structure replication, and then start the export process by selecting **Content Replication and Archiving** → **Export Content...**



Image 23: Selection of the vault and the Export Content dialog

The export dialog is divided into three tabs: *Package Location*, *Objects and Files*, and *Structure*. The image on the left shows the structure tab with all the metadata structure elements of the selected vault to be exported. It is also possible to export only a portion of the elements. The image on the right shows the structure tab with only some of the structure elements selected.

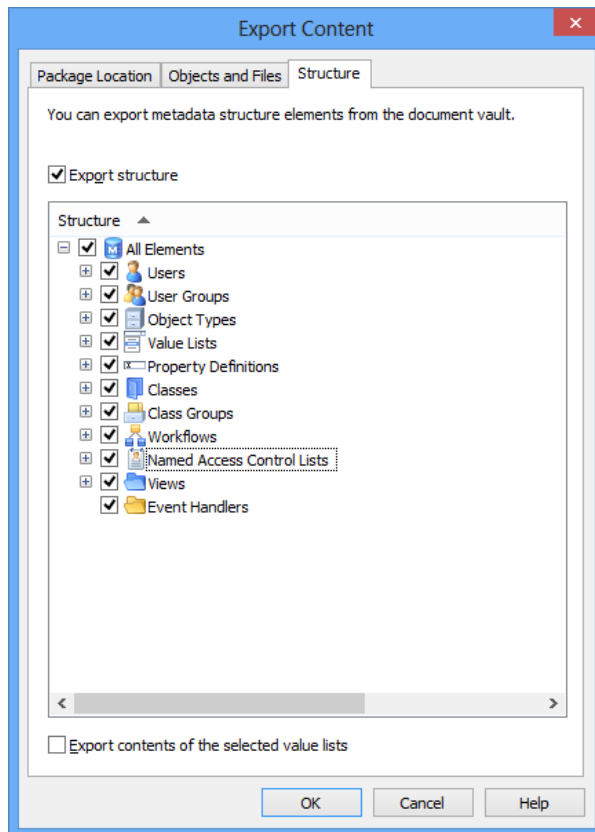


Image 24: Exporting the entire metadata structure

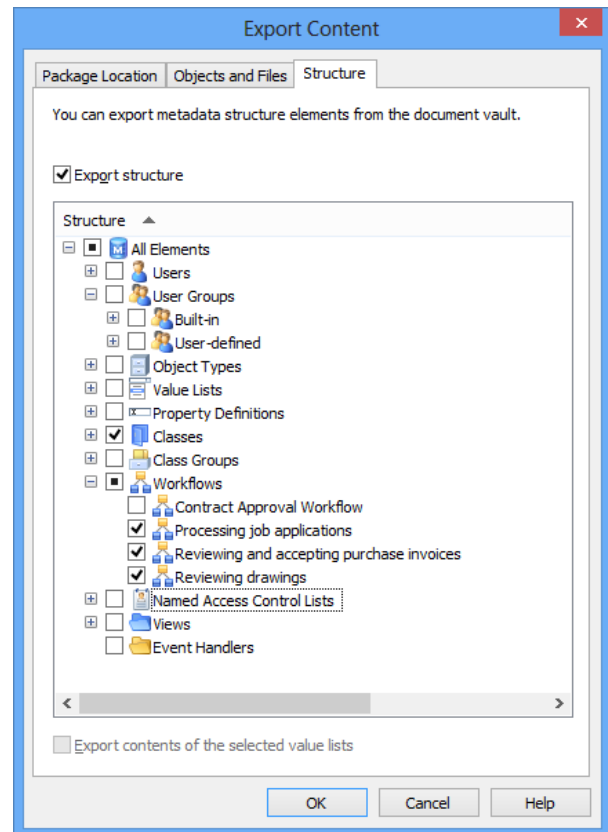


Image 25: Exporting only selected elements

Selecting **OK** creates an export package of the selected metadata to the location specified on the *Package location* tab.

Note: Built-in elements are always created in M-Files by default and include, for example, the property definitions *Name or title*, *Created by*, *Last modified by*, and *Keywords*. In addition to these, administrators can create new, user-defined elements.

6.3.2 Importing metadata structure

After creating an export package, you can import its content to a vault of your choosing. The importing dialog is accessed through the M-Files Server Administrator: **Content Replication and Archiving** → **Import Content...**



Image 26: Selection of the vault and the Import Content dialog

The import dialog is divided into the same three tabs as the export dialog.

The *Package Location* tab displays options related to the package containing the objects and related content and/or metadata structure to be imported. The content package can also be automatically deleted after importing by selecting the checkbox labeled *Delete content package after importing*.

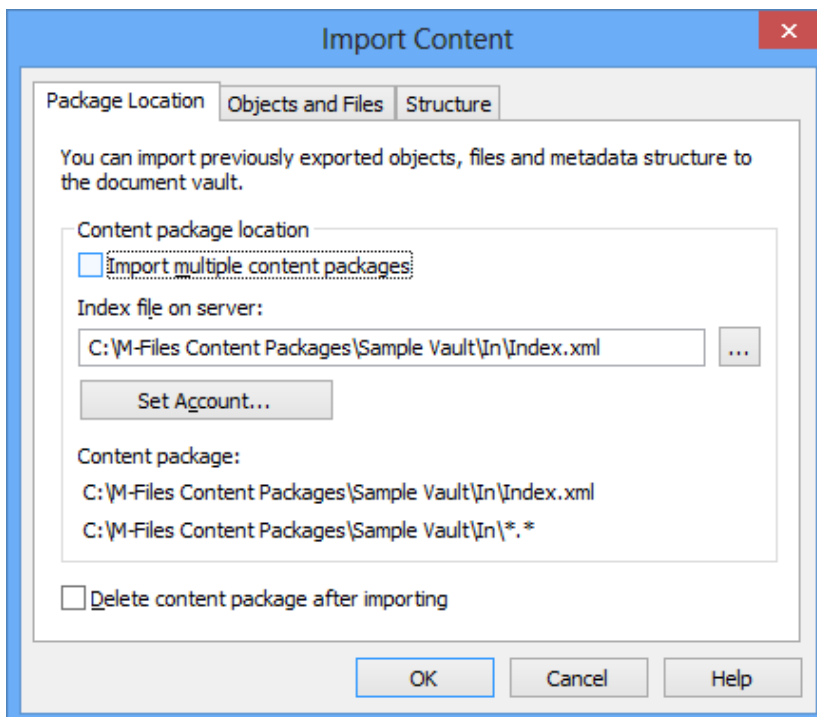


Image 27: Package Location tab of the import dialog

In the *Objects and Files* tab, you can change the way objects and related content are imported in the target vault.

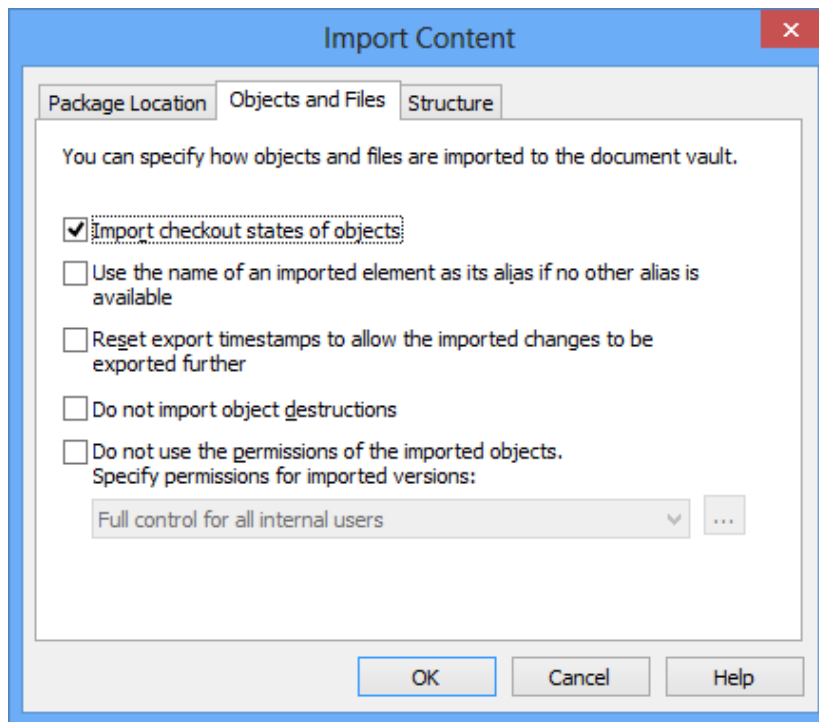


Image 28: *Objects and Files* tab of the import dialog

The *Structure* tab adds the option of disabling any external database connections to object types, value lists and user groups, as well as disabling any active event handlers to be replicated.

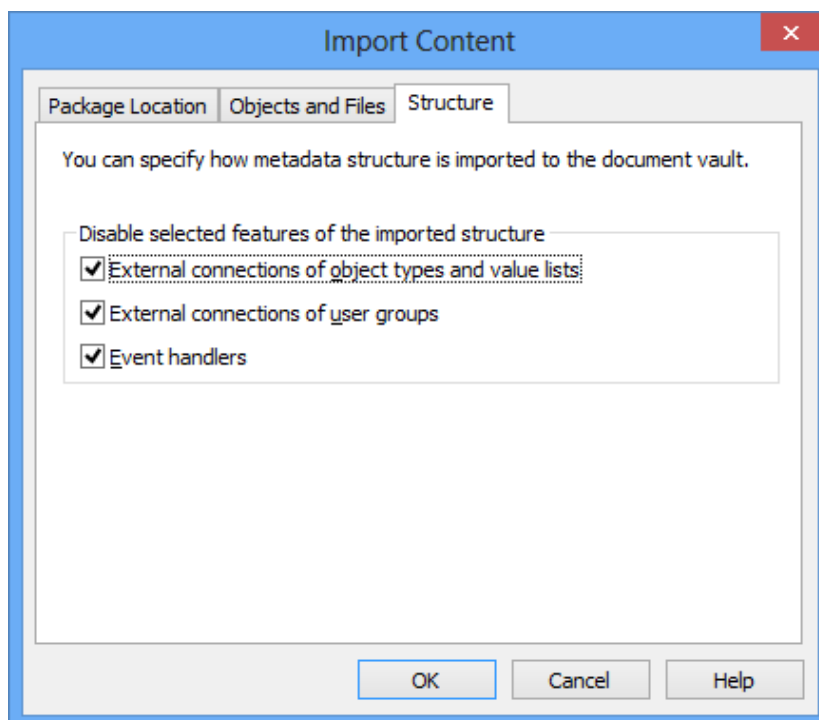


Image 29: *Structure* tab of the import dialog

Selecting **OK** generates a report that displays all modifications to the target vault structure.

6.3.3 Import summary report

Before accepting any changes to the target vault, M-Files presents a detailed summary of the content package to be imported. It is highly recommended to carefully review the summary report explaining the results of the content import.

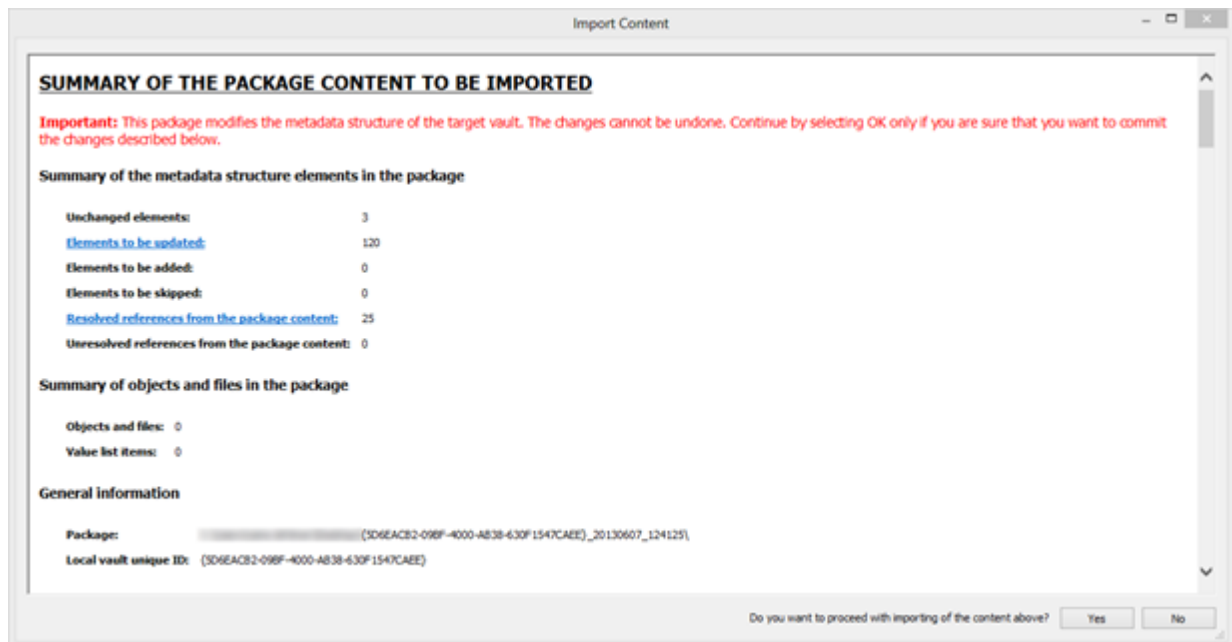


Image 30: Import summary report

It is very important to make sure that no unintended duplicate structure elements will be generated, and that all changes to the target vault's metadata structure will be as expected. In the event there are incorrect mappings, the process should be canceled and the names or aliases of the elements in the source or target vault modified accordingly.

Note: The imported metadata structure elements overwrite their existing counterparts in the target vault. It is not recommended to configure similar object type structures in the master vault and replica vault if the vaults have different connections to external databases configured.

6.4 Replication of values in value lists

Along with the export and import of metadata structure come two important features related to value list replication: the *replication of all values contained in value lists*, in addition to the *replication of values that have been removed*.

6.4.1 Replication of all values contained in value lists

Previously, the replication procedure enabled users to transfer only *referred values* through the replication of objects and related content. This means that values could only be replicated to the target vault via the replication of objects with properties based on value lists.

In M-Files 10.0, metadata structure import and export enables transfer of the *entire collection of values* of a source vault to a selected target vault (see chapter 6.3).

6.4.2 Replication of values removed from value lists

Metadata structure import and export also transfers all the values of the chosen value lists if the "Export content of the selected value lists" checkbox has been enabled (see chapter 6.3.1). All the values that have been removed are thus replicated as well. This means that values in the target vault may be deleted through a metadata structure import.

The values are not deleted completely, however, but instead only *marked* as deleted. This enables the replication of deleted values, and most importantly, the ability to search and re-enable any deleted values in the source or target vault via the M-Files Server Administrator.

6.5 **Special considerations for developers**

Scripts should not use local IDs to retrieve metadata structure elements. Instead, either an alias corresponding to the local ID or the actual GUID should be used.

The "last used" value of automatic values is not replicated. It is also recommended that automatic values be dynamically calculated in scripts. For example, a script could retrieve the next value from a common location accessible to all vaults. Another option could be to add a prefix based on the vault where the script is executed.

7. Improvements in Web Access

Note: The user interface and features of M-Files Web Access are not yet final in the Beta stage.

7.1 Visual updates

Web Access has been updated with new graphical elements, as well as a new and enhanced metadata card making editing metadata easier than ever. The layout has been simplified and enhanced to ensure ease of use without losing access to any important functionality.

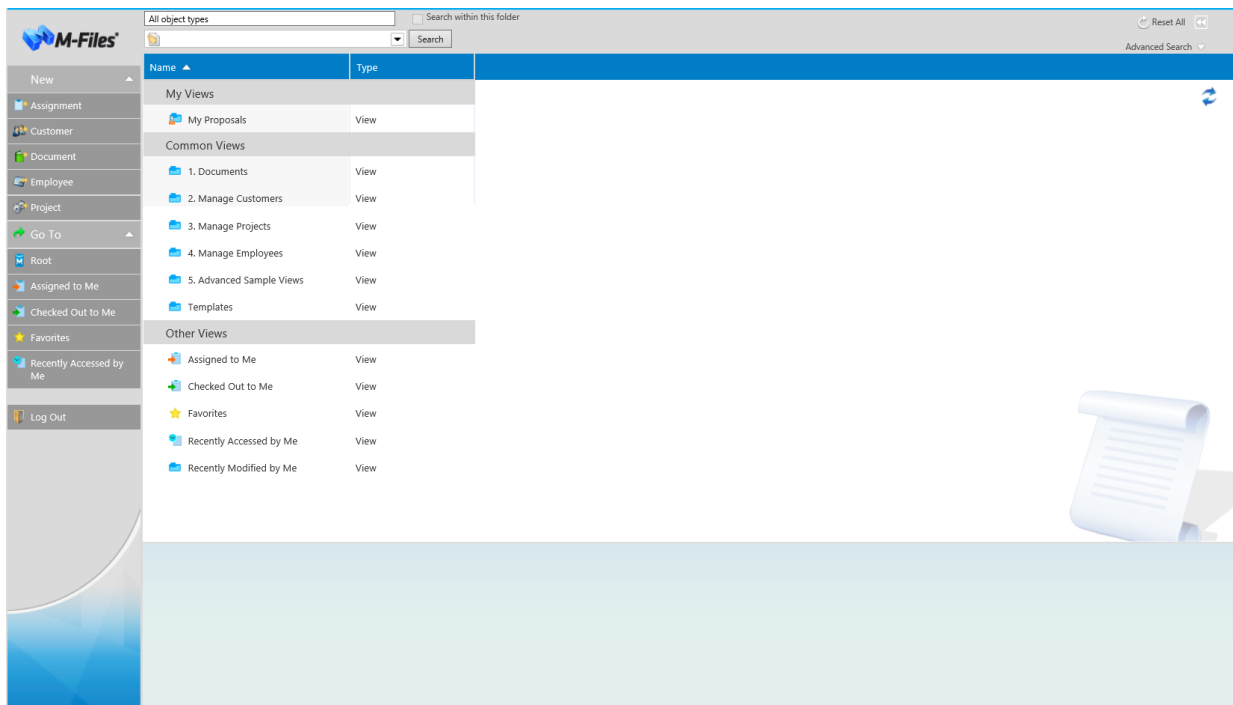


Image 31: M-Files Web Access Home view

7.2 E-signing

M-Files 9.0 introduced support for electronic signatures for workflow state transitions in the M-Files Windows client software. M-Files 10.0 extends support for electronic signatures to M-Files Web Access.

Electronic signing is available only to users that are logged in with their Windows credentials, and can only be applied to one object at a time. In addition, the only way to electronically sign objects that are checked in is by using the *change state* and *electronic signature* dialogs.

Note: The eSigning & Compliance module is required to use this feature.

7.3 "Remember me" functionality

When logging in using M-Files Web Access, selecting the *Remember me* setting from the login view keeps your session active until you log out of Web Access.

7.4 Authentication changes in Web Access configuration

With Windows authentication enabled, Web Access can automatically use your Windows credentials to log you in. In other words, you no longer need to enter your login credentials in the Web Access login form.

In M-Files 10.0 it is possible for the Web Access administrator to configure the SSO (Single Sign On) setting via the configuration site so that the login credentials are no longer required when you use M-Files Web Access. The automatic authentication is enabled by setting the SSO value to *Use automatically*.

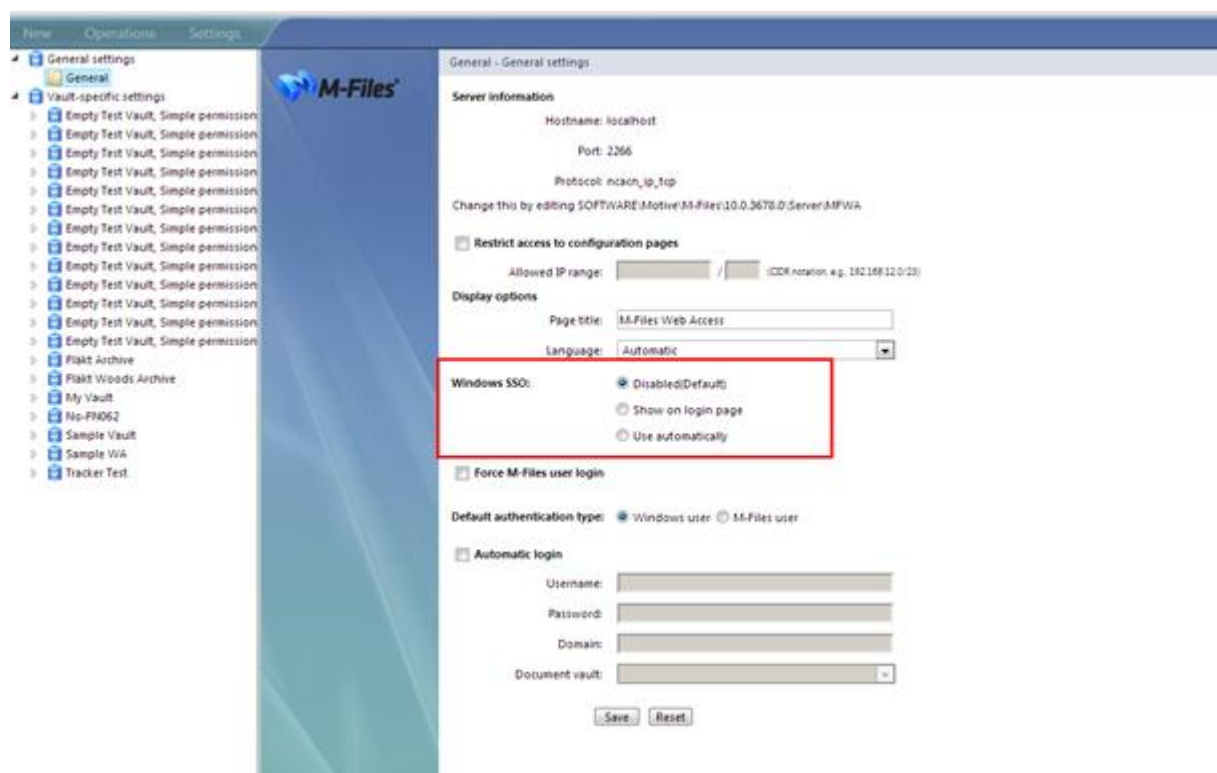


Image 32: M-Files Web Access login with Windows SSO

8. UI Extensibility Framework improvements

M-Files UI Extensibility Framework was introduced in September 2012 with M-Files 9.0 to enhance customers' and partners' ability to build a variety of business applications using the M-Files platform. You can take a look at some of the latest applications and download free apps from the [M-Files Solution Catalog](#).

M-Files 10.0 comes with multiple ease-of-use improvements to the UI Extensibility Framework and introduces greatly improved support for JavaScript programming style.

8.1 Visual flexibility

Among other improvements, the visual look and feel of the M-Files Windows client software is now extremely customizable. In addition to the versatility of previous versions of M-Files, you can now modify the background of the task pane, the search pane, and the listing view, as well as change the typeface and color of the fonts on the user interface. This enhanced level of customizability makes it possible truly make the look and feel of the M-Files Windows client your own.

8.2 Persistent right-side pane

In M-Files 10.0 a UI Extensibility application can be implemented to include a persistent right-side pane. This enables the creation of custom web-based applications that always remain active in the right-side pane while executing other commands or navigating the vault.

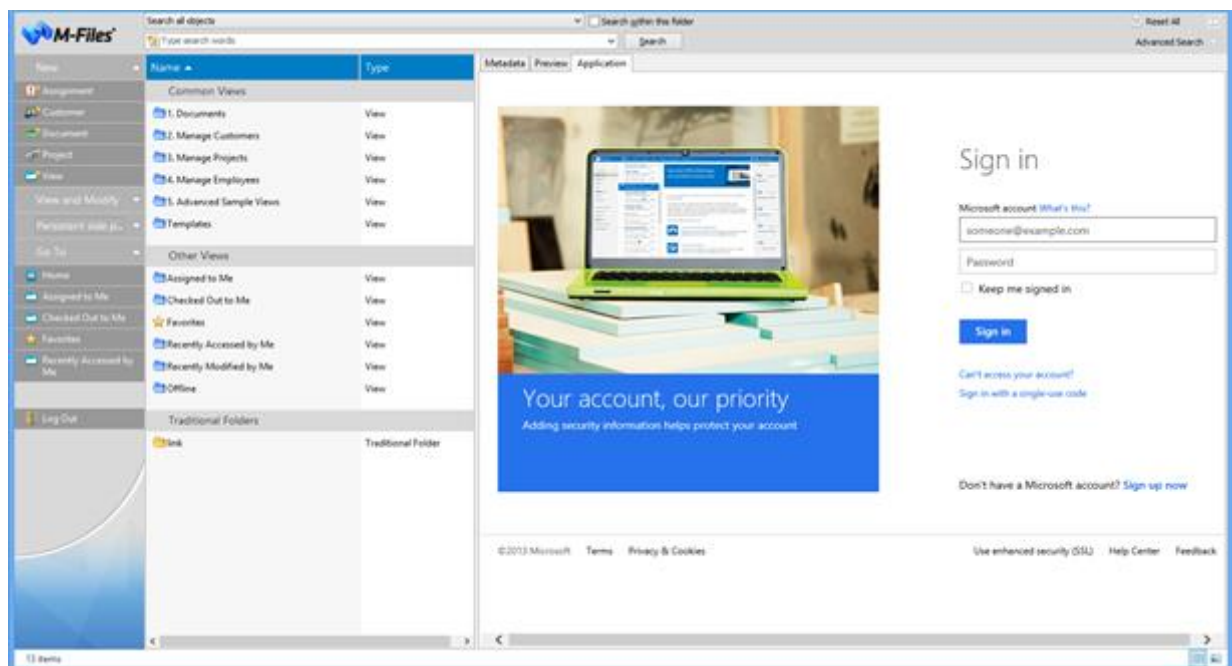


Image 33: M-Files Client showing a web-based application in the right-side pane

The above image displays a web-based application in the M-Files Windows client. The application runs as a persistent web session in one of the tabs of the right-side pane despite any other actions taking place in the client.

For more documentation, the integration cookbook, and sample applications, please refer to http://www.m-files.com/UI_Extensibility_Framework.

9. Other improvements

9.1 M-Files vault-specific icon customization

You can change the icons associated with document vaults attached to the M-drive. This makes it easier to select the appropriate vault when using multiple vaults in your environment.

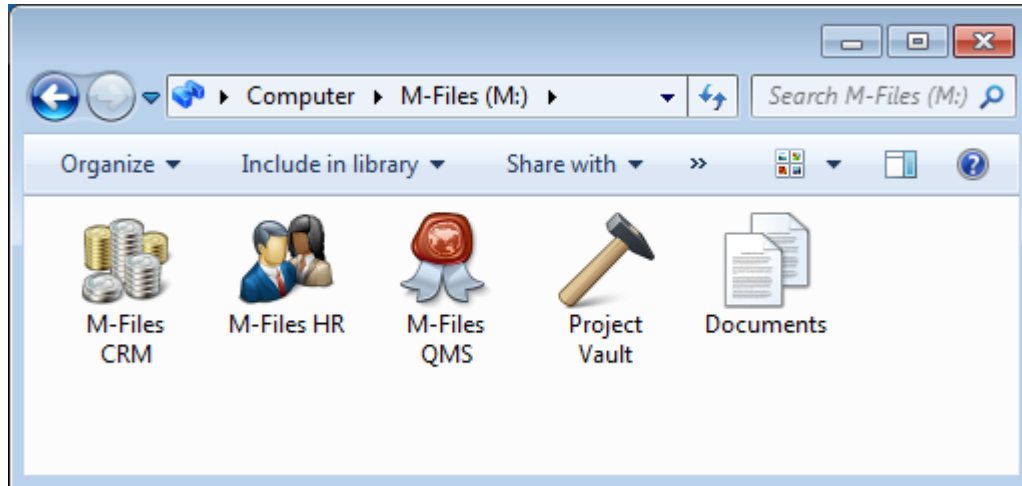


Image 34: Examples of customized vault icons

The vault icon can be changed in the Document Vault Properties window in the M-Files Server Administrator.

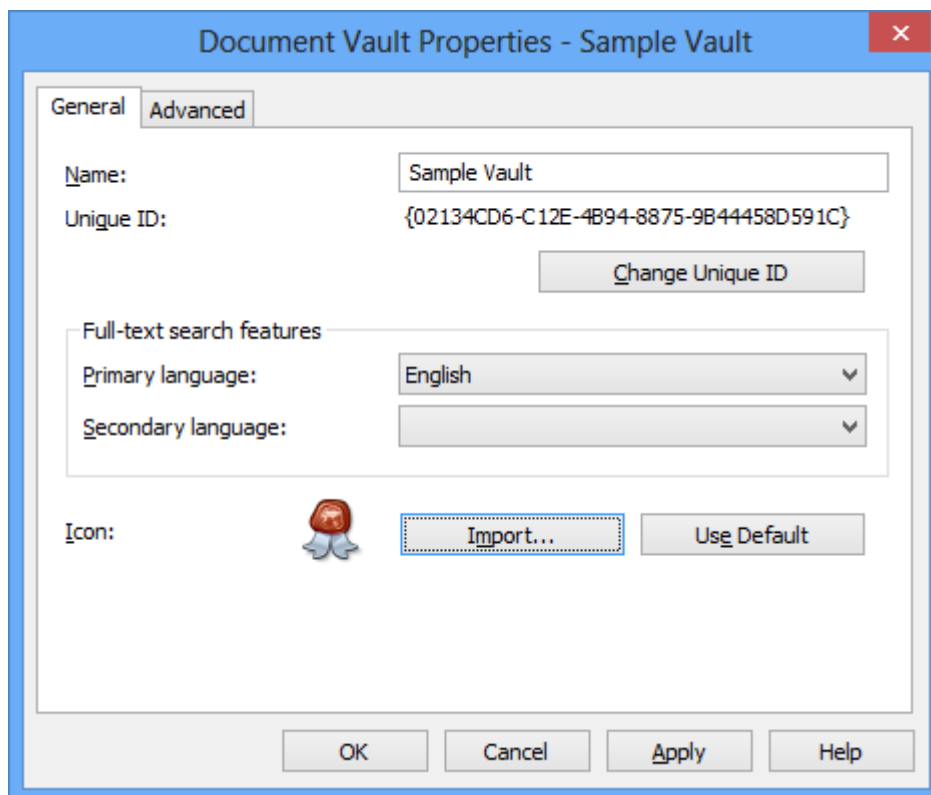


Image 35: The properties window of a vault

9.2 Use of placeholders in notification messages and property values

Placeholders can be used to add dynamic content to notification messages and property values. For example, you can define that the title of an agreement is generated by concatenating other metadata property values, such as agreement type and date.

M-Files 10.0 makes the selection of these placeholders easier, in addition to enabling the use of indirect placeholders.

9.2.1 Selecting placeholders from a predefined list

Instead of entering placeholders manually, M-Files 10.0 enables the selection of placeholders from a predefined list when creating an automatic value for a property definition, or when defining an action related to a workflow state transition.

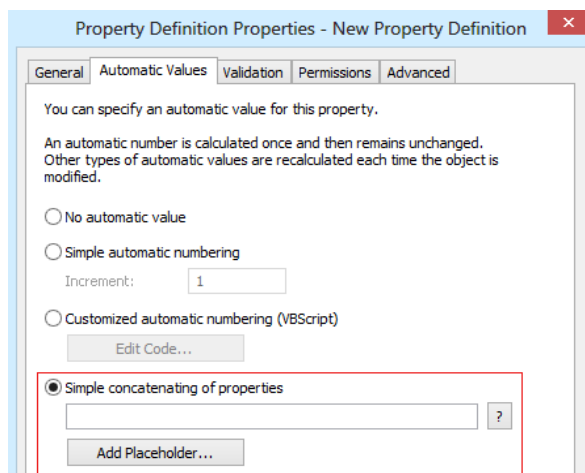


Image 36: Using an automatic value as a property definition and opening the placeholder list

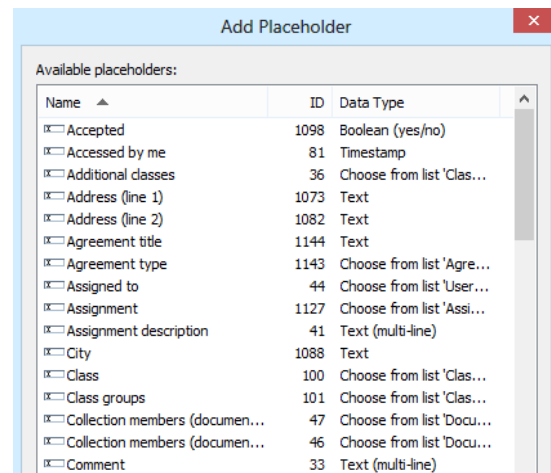


Image 37: List of available placeholders

A list of available placeholders can be opened when specifying an automatic value for a property. The **Add Placeholder...** button opens the list of property definitions and other placeholders available for use.

Adding any of the three actions indicated in image 34 also includes the ability to add placeholders directly from a list similar to the one shown in image 33.

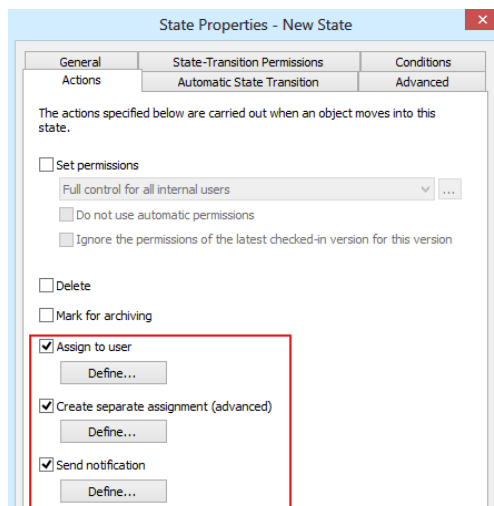


Image 38: Workflow state related actions enabling the use of placeholders

9.2.2 Indirect placeholders

Indirect placeholders are metadata indirectly related to an object. For example, if a contract is related to a customer object, the country of the customer is indirect metadata for the document.

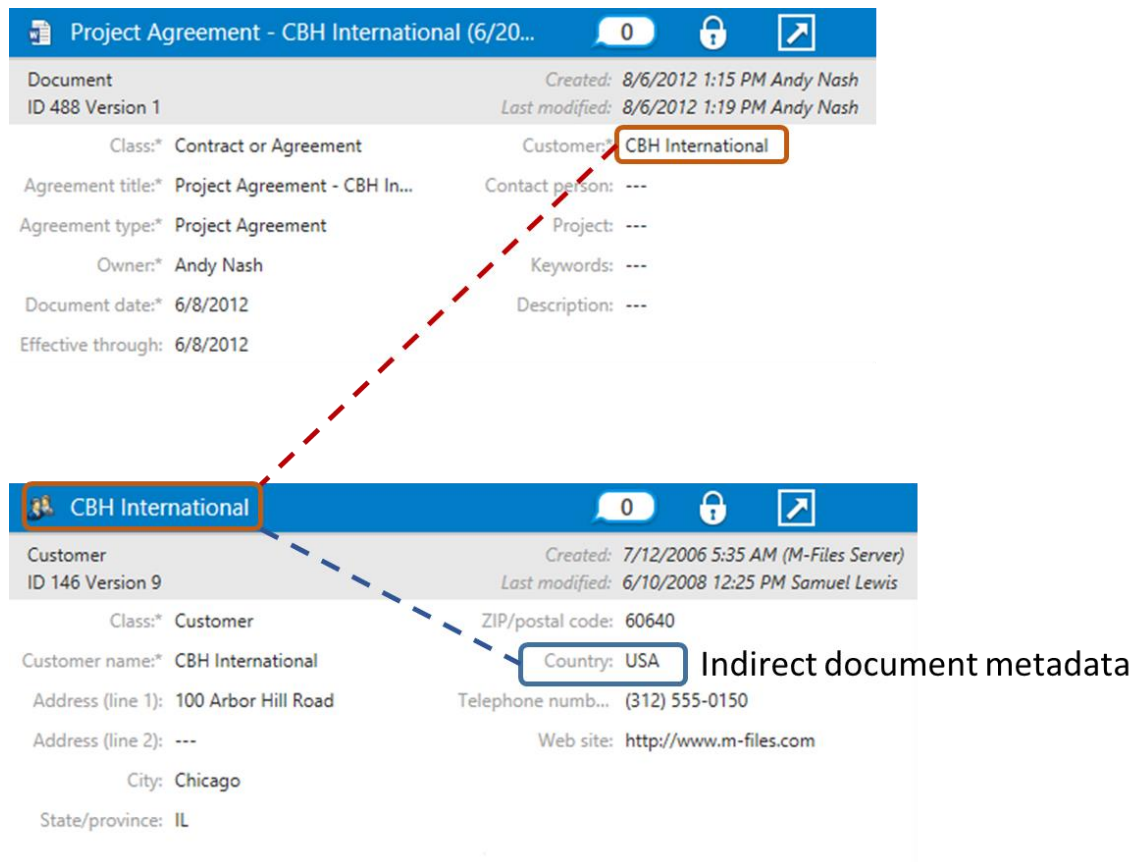


Image 39: Indirect document metadata

To specify the customer's country as an indirect placeholder the syntax `%PROPERTY_1079.PROPERTY_1088%` is used, where `1079` is the property definition ID for *customer* and `1090` is the property definition ID for *country*.

9.2.3 Available custom placeholder strings

Custom placeholder strings can contain the following types of elements:

STRING	RESULT	INDIRECTNESS
%PROPERTY_X%	Value of property X	Can be used on any level
%OBJTYPE_Y%	Values of all the properties that can refer to object type Y	Can be used on any level
%USERCAUSEDWORKFLOWSTATE_Z%	The user that changed the state of the object to Z	Cannot be used as part of an indirect placeholder

Table 1: Possible elements to be used in custom placeholders

9.3 Support for multi-line text in hyperlinks

M-Files 10.0 supports the use of the multi-line text data type with hyperlinks. This feature is very useful when operating with multiple vault scenarios where the URL addresses can become very long. As a result, URL addresses do not need to be shortened manually.

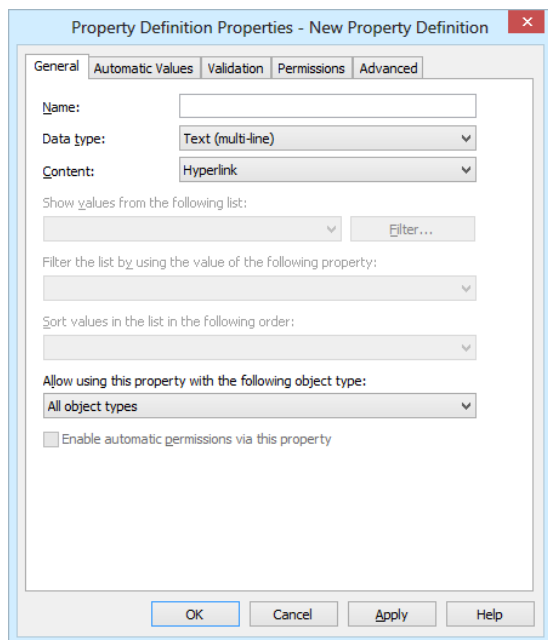


Image 40: Multi-line support for hyperlinks

Note: Standard "single-line" text properties can only contain up to 100 characters.

9.4 Changes to SkyDrive co-authoring

In M-Files 10.0, accessing and modifying documents in SkyDrive is possible without a Windows Live ID. Co-authoring can be performed by accessing the SkyDrive service via a link that can be sent via email or instant message.

Note: You must have a Windows Live ID to publish a document via SkyDrive.

10. Improvements to CRM integrations

10.1 M-Files for Salesforce CRM

M-Files 10.0 includes stability enhancements to the Salesforce CRM integration that improve performance in daily use. In addition, the M-Files server installation procedure is significantly easier than before.

The M-Files for Salesforce CRM integration enables synchronization of Salesforce CRM objects to an M-Files document vault. This enables documents and other M-Files objects to be tagged with Salesforce objects as metadata, such as accounts and opportunities. The objects are automatically synchronized bi-directionally between Salesforce CRM and M-Files.

The improved version of the Salesforce CRM integration includes the ability to use the integration with both cloud-based and on-premise M-Files servers; previously, only cloud-based M-Files servers were supported.

In addition, it is possible to configure which Salesforce CRM object types and properties are synchronized.

Note: Changes to default settings requires M-Files consulting assistance.

You can download M-Files for Salesforce CRM from the [M-Files Solution Catalog](#).

10.2 M-Files for Microsoft Dynamics CRM

The M-Files for Microsoft Dynamics CRM integration now supports Microsoft Office 365 Dynamics CRM, in addition to the on-premise version of Microsoft Dynamics CRM and the cloud-based version, Microsoft Dynamics CRM Online.

You can download M-Files for Microsoft Dynamics CRM from the [M-Files Solution Catalog](#).

11. M-Files Cloud Vault enhancements

M-Files can be deployed on-premise, in a private cloud, or as a public cloud service (M-Files Cloud Vault) provided by M-Files Corporation.

M-Files Cloud Vault leverages Microsoft's Windows Azure cloud services (PaaS). The system architecture is based on secure, scalable and redundant services without a single point of failure. This architecture has allowed M-Files to provide high-availability features that are not available in even virtualized server environments.

Please contact M-Files at m-files@m-files.com to learn about options for migrating your on-premise M-Files environment to the cloud.

With the release of M-Files 10.0, M-Files Cloud Vault provides improved support for the Windows Azure cloud platform with enhanced fault tolerance, more versatile subscription management features, and improved search speed for full-text searches.

11.1 Reset password

Passwords can be reset via the *Forgot Password* link on the Cloud Vault service login page. Selecting the link sends the user an email containing a hyperlink that enables the password to be reset.

11.2 M-Files Cloud Vault Subscription Management Portal

The new M-Files Cloud Vault Subscription Management Portal lets end-user administrators manage their subscriptions online.



Image 41: M-Files Cloud Vault Subscription Management Portal Main View

The key features of the Subscription Management Portal are:

- **Add new users:** enables ordering additional licenses and adding new users. The new licenses are available immediately after the order has been submitted.
- **Download installers:** enables downloading of the M-Files Client software installers via the portal.
- **Change user details and license types:** allows resetting of users' passwords, license type changes, and edits to user details, such as email addresses.

Additional information

For more information on the use of M-Files Cloud Vault, please refer to:

http://www.m-files.com/eng/res/M-Files_DMS_Cloud_Vault_Getting_Started_Guide.pdf

The Cloud Vault Subscription Management Portal can be accessed from:

<https://management.cloudvault.m-files.com/>

12. Other changes in M-Files 10.0

The new User Interface in M-Files 10.0 delivers better user experience by showing the most relevant features in different use case scenarios and in a more heuristic way than before. To lower the end-user threshold to get quickly up to speed with M-Files, some of the advanced features of M-Files are now hidden by default.

12.1 Menu toolbar

The menu toolbar is hidden by default. You can show it by pressing the Alt key in the client.

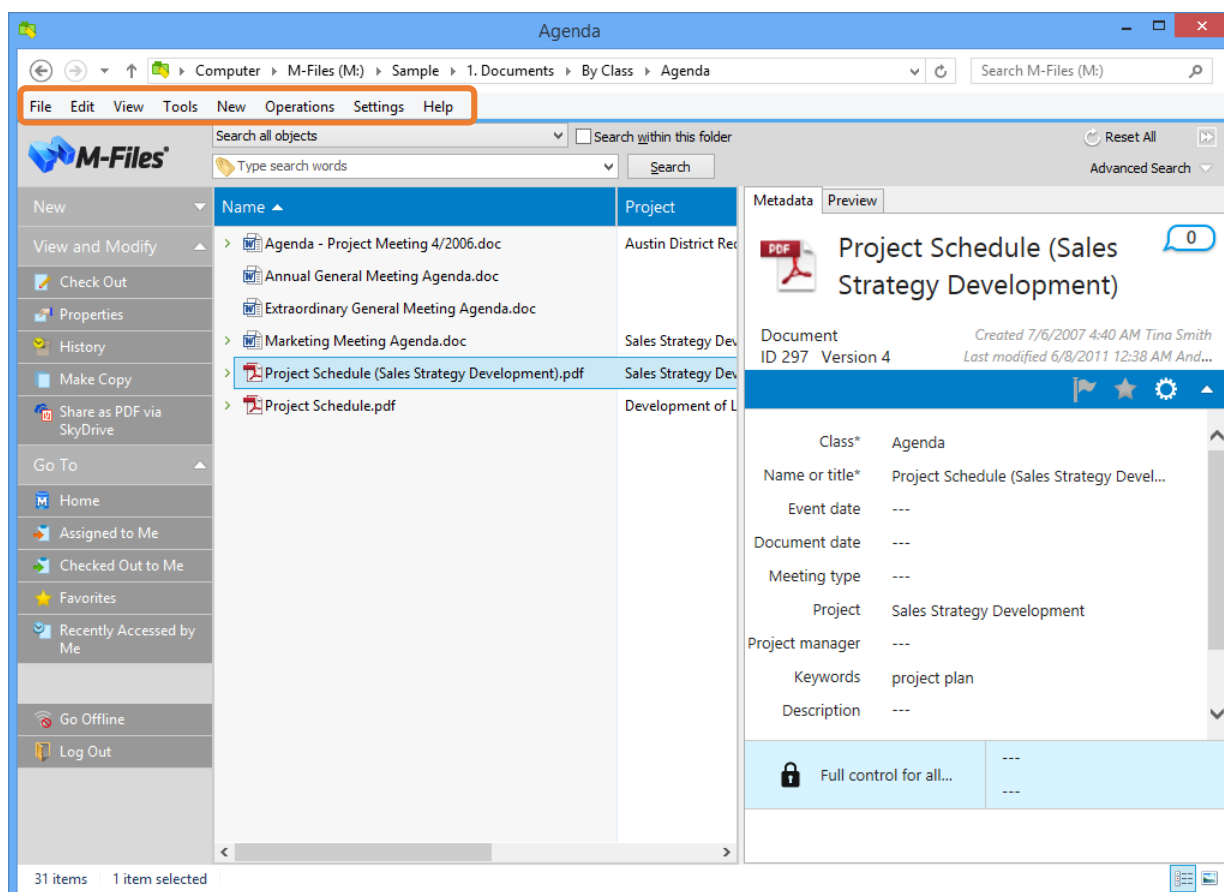


Image 42: The menu toolbar in M-Files 10.0

12.2 Search refinements

The search refinement buttons are hidden by default in M-Files 10.0. These can be enabled by adding the following registry key value to the Windows registry of the client computer:

```
[HKEY_CURRENT_USER\Software\Motive\M-Files\<version>\Client\MFShell\<vault>]  
"MaxSearchRefinementOptionCount"=dword:00000003
```

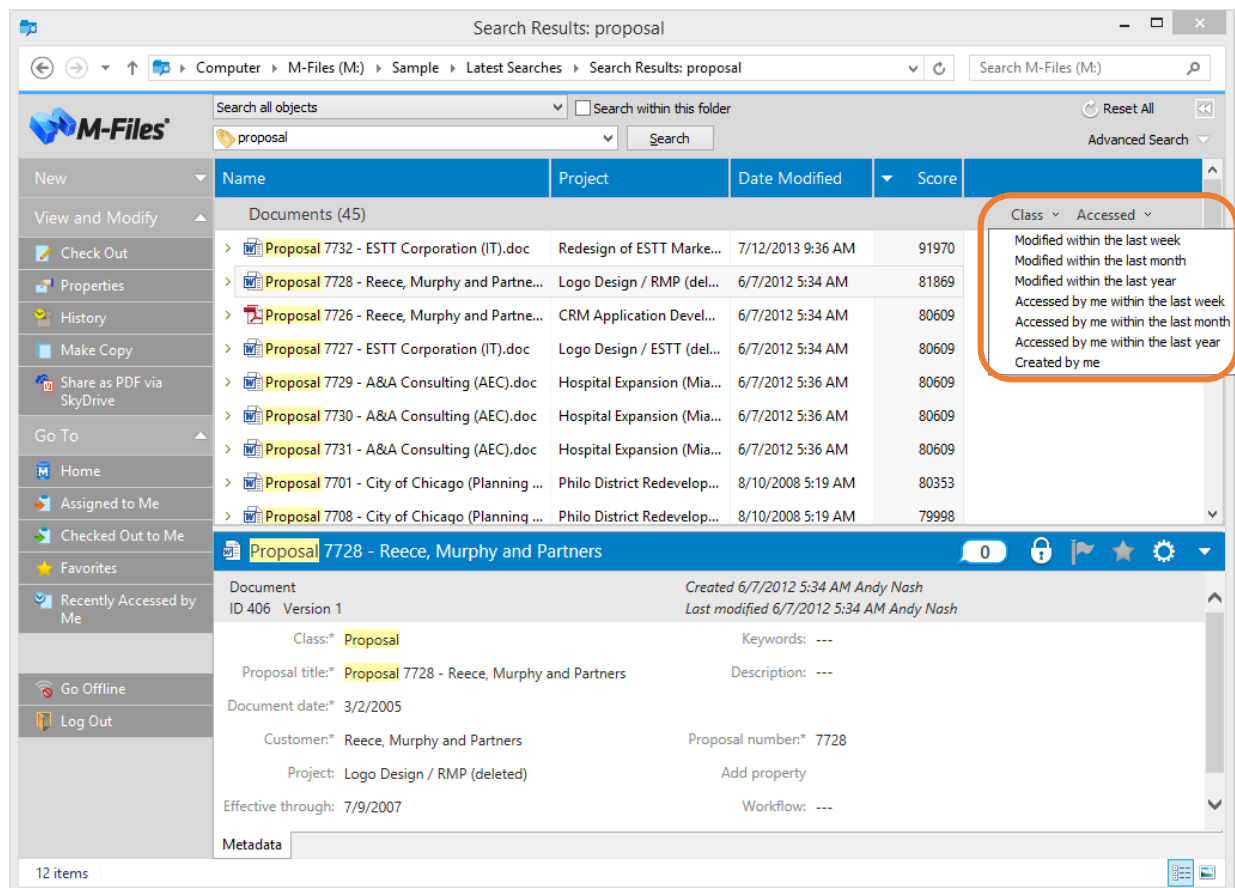



Image 43: The search refinement buttons in M-Files 10.0

12.3 Navigation pane

The navigation pane is hidden by default in M-Files 10.0. You can enable it from the *View* menu.

13. Language versions of M-Files software

M-Files software is available in 24 languages:

- | | | |
|--------------------------------|-----------------------|-----------------|
| ✓ English | ✓ Hungarian | ✓ Greek |
| ✓ Finnish | ✓ Italian | ✓ Croatian |
| ✓ French | ✓ Portuguese (Brazil) | ✓ Slovenian |
| ✓ German | ✓ Polish | ✓ Vietnamese |
| ✓ Spanish | ✓ Dutch | ✓ Czech |
| ✓ Chinese (Traditional/Taiwan) | ✓ Russian | ✓ Bulgarian |
| ✓ Chinese (Simplified/PRC) | ✓ Swedish | ✓ Arabic (Beta) |
| ✓ Japanese | ✓ Turkish | ✓ Hebrew (Beta) |

M-Files also lets you to translate the metadata structure to any language. Users can individually select the software and metadata structure language of their preference.

The Web Access language is determined by each user's browser settings. It is also possible for the system administrator to define the language via the Web Access configuration site regardless of the user's browser settings.

The language of the Mobile Access user interface can be changed in the device settings.