



M-FILES ADD-IN FOR SHAREPOINT ONLINE SOLUTION DESCRIPTION

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This document describes the high-level architecture and the features of M-Files Add-in for SharePoint Online. For instructions on taking the add-in into use, see the document [Installing and Configuring M-Files Add-In for SharePoint Online](#).

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1. Architecture

M-Files Add-in for SharePoint Online (later in this document the add-in) is a simplified M-Files client, that can be embedded to a SharePoint Online site. All add-in code is run on the M-Files server and documents are stored in M-Files. Thus, the add-in does not require you to make any customizations on the SharePoint servers. The add-in uses vNext-based M-Files Web as its backend for connecting to M-Files server. vNext web engine is included in the M-Files server software package.

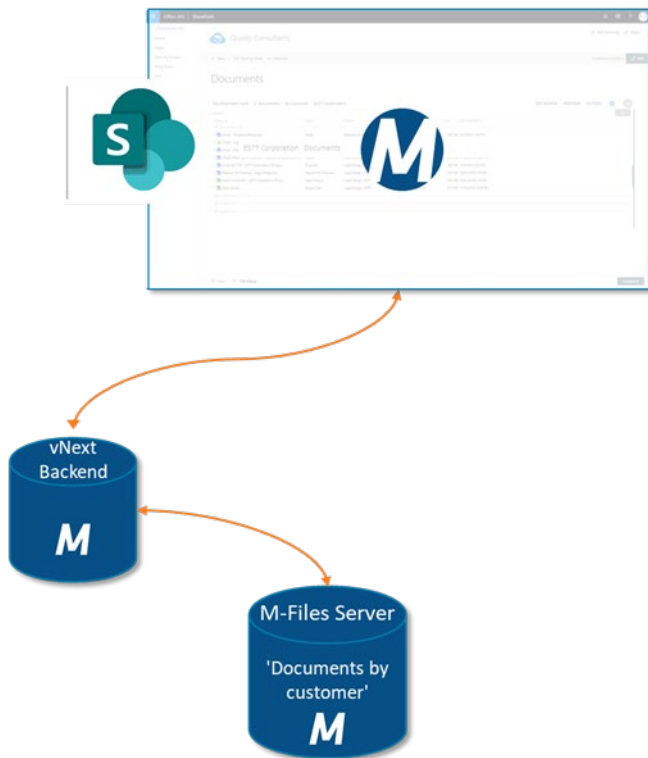


Figure 1: High-level setup

The add-in is delivered as a separate installation package via M-Files Solution Catalog. You can simply drag and drop the add-in installation package to the SharePoint add-in catalog. From there, it can be added to any SharePoint page and configured to show the relevant M-Files content.

You can update the add-in by replacing an older installation in the SharePoint add-in catalog. Doing this will automatically update the add-in on all the SharePoint pages that are already using it.

The add-in can be configured to show M-Files content based on a certain view or a keyword. Alternatively, it can be used simply to search for information inside M-Files.

M-Files Add-in ✕

Server Settings


Server URI *

Please enter a value.

Vault GUID *

Please enter a value.

View URI (Optional)

 Use Current View

Keyword (Optional)

Editing
 On

Figure 2: The add-in settings

2. Solution

The add-in is one of the embedded M-Files installations that enable you to use M-Files inside other web applications. The add-in allows you to see all the content you are looking for directly via SharePoint, without the need to switch between applications. With the add-in, you can view and edit documents that are stored in M-Files and add new documents to M-Files. The add-in is only used for client operations, and no documents are stored in SharePoint.

The add-in is not meant to replace the M-Files clients (M-Files Desktop, M-Files Web, and M-Files Mobile), but it can be used for carrying out light daily tasks of viewing and editing content. Some features, such as defining new views or viewing object history, you can only use via the M-Files clients.

M-Files, as a unique repository-neutral solution, differentiates M-Files Add-in for SharePoint Online from the competition, as the add-in makes all the content through various external repository connections available for you. The documents that you can access via the embedded user interface of the add-in may reside, for instance, on a network drive, another SharePoint site, or Google Drive.

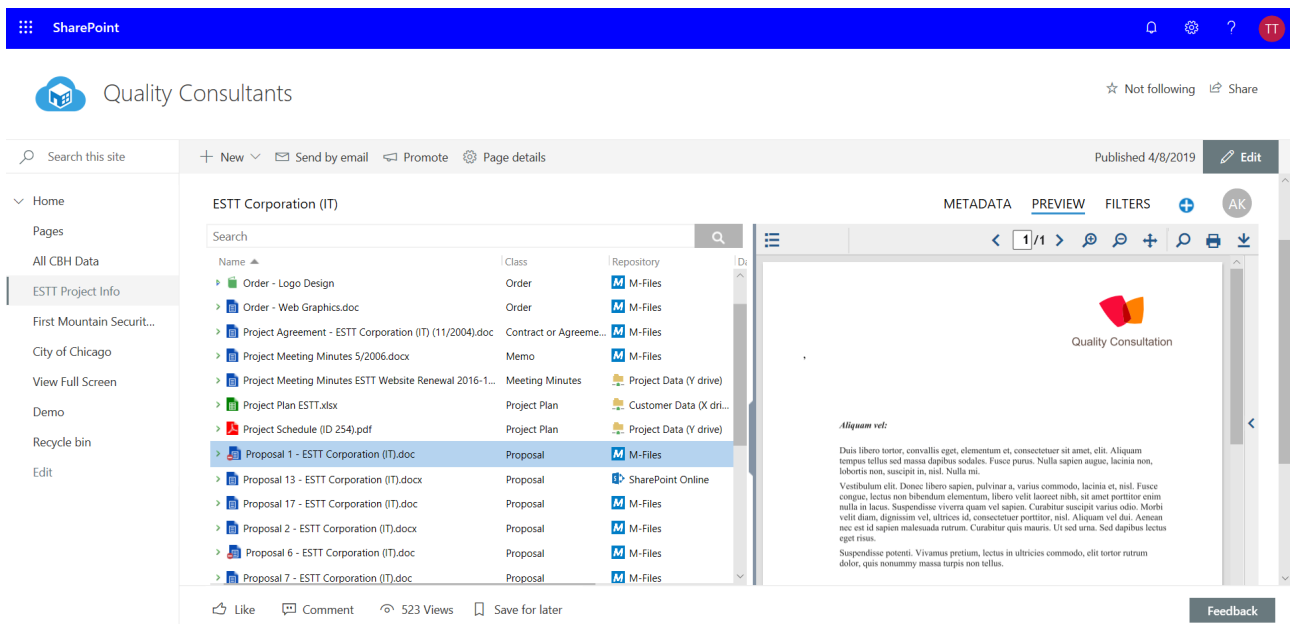


Figure 3: The add-in user interface in SharePoint.

2.1 Access Rights

All M-Files Add-in for SharePoint Online users need to have a valid M-Files license. Access rights to the documents and other objects in M-Files are based on the M-Files permission settings of the objects. Single sign-on to SharePoint Online and M-Files can be enabled with Microsoft Entra ID or Azure Active Directory Federation Services.

Earlier M-Files Listing Web Part for SharePoint allowed using common credentials for external M-Files users. This is no longer possible. But since the external users need to have Office 365 access rights, it is easy to associate those with a specific Microsoft Entra ID or Azure Active Directory Federation Services user group that only has the read-only access rights in M-Files.

2.2 Example Use Cases

Many companies use SharePoint sites for sharing project-related information. Even when the official project documentation is managed in M-Files, with M-Files Add-in, project members can access all the project information directly via a SharePoint site. Project managers can carry out light edits, for example, to the schedule while other members use the add-in for viewing the shared information via the SharePoint user interface.

Some companies use SharePoint to publish work-related instructions, such as safety regulations or compliancy checklists. The documents can be controlled and managed in M-Files by the quality organization, but the rest of the organization can view them all in SharePoint, which the company uses as a publishing portal for instructions and other relevant information.

2.3 Features

The add-in can be configured to show M-Files content based on a certain view or a keyword, or optionally can just be used to search for information inside M-Files. By default, the add-in is in read mode, meaning that the objects and their metadata can be viewed but not modified. The edit mode of the add-in enables modifying and adding metadata properties, including comments, permissions, and workflows.

The read mode of the add-in lists the objects included in the view, shows their metadata and comments, offers a preview of the document content, and allows you to search for content within the view. You can also open documents in read-only mode by double-clicking them, and browse object relationships in the listing area. When the add-in is in read mode, users cannot edit documents or their metadata even when the M-Files permission settings allow them to do so. This mode should be used when the data is only meant to be shared.

When editing via the add-in is allowed, you can add comments, edit metadata, modify permissions, and change workflow states. You can add new documents to M-Files by dragging and dropping them to the view or by clicking the **New** button. Being able to edit the documents and their metadata always requires you to have valid access rights to the objects.

The backend of the add-in is updated monthly along with the M-Files server update, making it possible to add new features and capabilities without requiring you to update the actual add-in in the SharePoint add-in catalog.

3. Licensing

M-Files Add-in for SharePoint Online is available for M-Files Online customers only. Additionally, customers need to purchase a separate M-Files for SharePoint Online license, which also includes the right to use M-Files SharePoint Online Connector. All M-Files Add-in for SharePoint Online users need to have a valid M-Files license.

M-Files Add-in for SharePoint Online works for both on-premises and M-Files Cloud customers.

4. Change History

The table below describes the essential changes by document version.

| VERSION | DATE | ESSENTIAL CHANGES |
|---------|------------|--|
| 1.0 | 2019/05/27 | Initial version. |
| 1.1 | 2019/08/14 | Added Microsoft Teams related information. |
| 1.2 | 2019/08/20 | Minor changes. |
| 1.3 | 2019/30/09 | Minor modification to chapter 4. |
| 1.4 | 2021/12/16 | Updates to sections 1 and 2. |
| 1.5 | 2023/05/18 | Removed Microsoft Teams related information. M-Files for Microsoft Teams has replaced the previous Teams add-in. |
| 1.6 | 2024/01/12 | Changed Azure AD into Microsoft Entra ID. |

5. Reference Documents

You may want to see these articles for additional information:

- [Installing and Configuring M-Files Add-In for SharePoint Online](#)
- [Setting Up the Environment for M-Files vNext Backend Server](#)
- [Setting Up Single Sign-On for M-Files Add-in for Salesforce CRM](#)