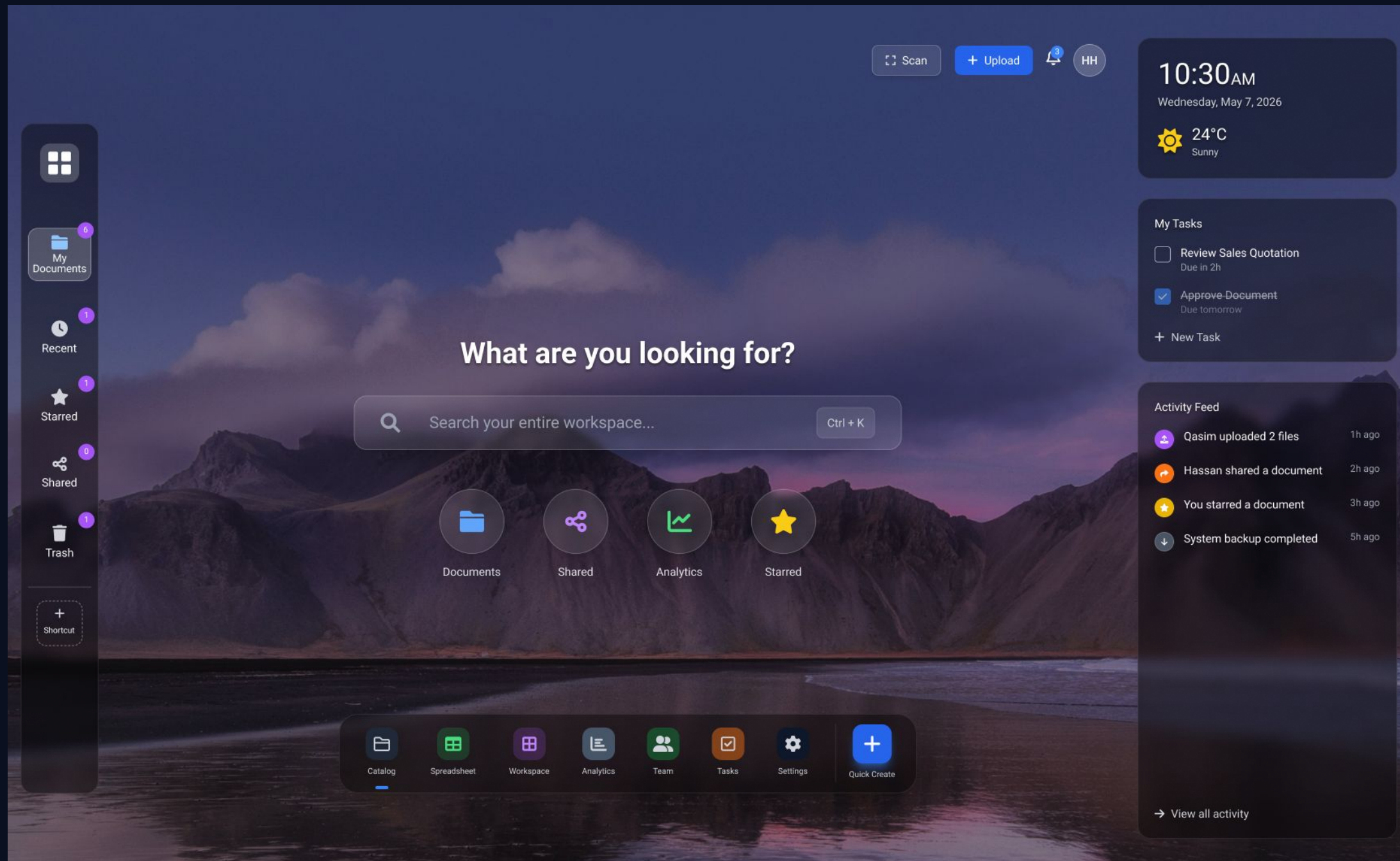


DMS redesign

Design case study

Previous interface, redesigned workflows and design rationale



A broader workspace for document work

The previous UI centers on document lists, basic tasks and administrative tables.

The new design brings document work, task coordination and detailed settings into a shared desktop environment.

This presentation explains the visible changes and the rationale each change can support.

The supplied design scope

14 screenshots document the previous interface.

38 screenshots document the new direction, including alternate views and modal states.

The new set covers entry, workspace, ingestion, sharing, teams, tasks and 12 settings categories.

Evidence and design intent

Screenshots establish layout, labels and visible controls. They do not establish working software.

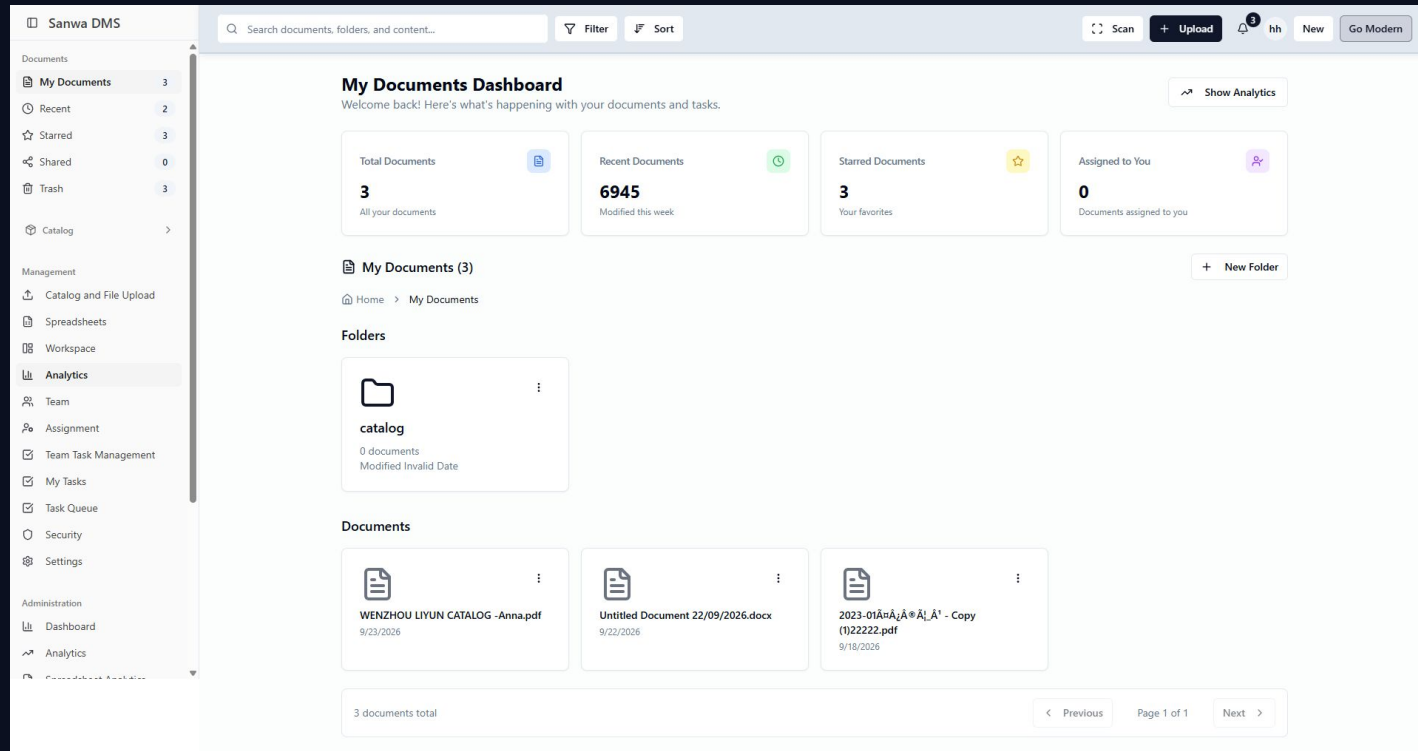
The rationale in this deck interprets the design decisions visible in the files. It does not claim a documented research process.

Expected benefits remain hypotheses until users test the workflows. Sample metrics and security labels belong to the mockups.

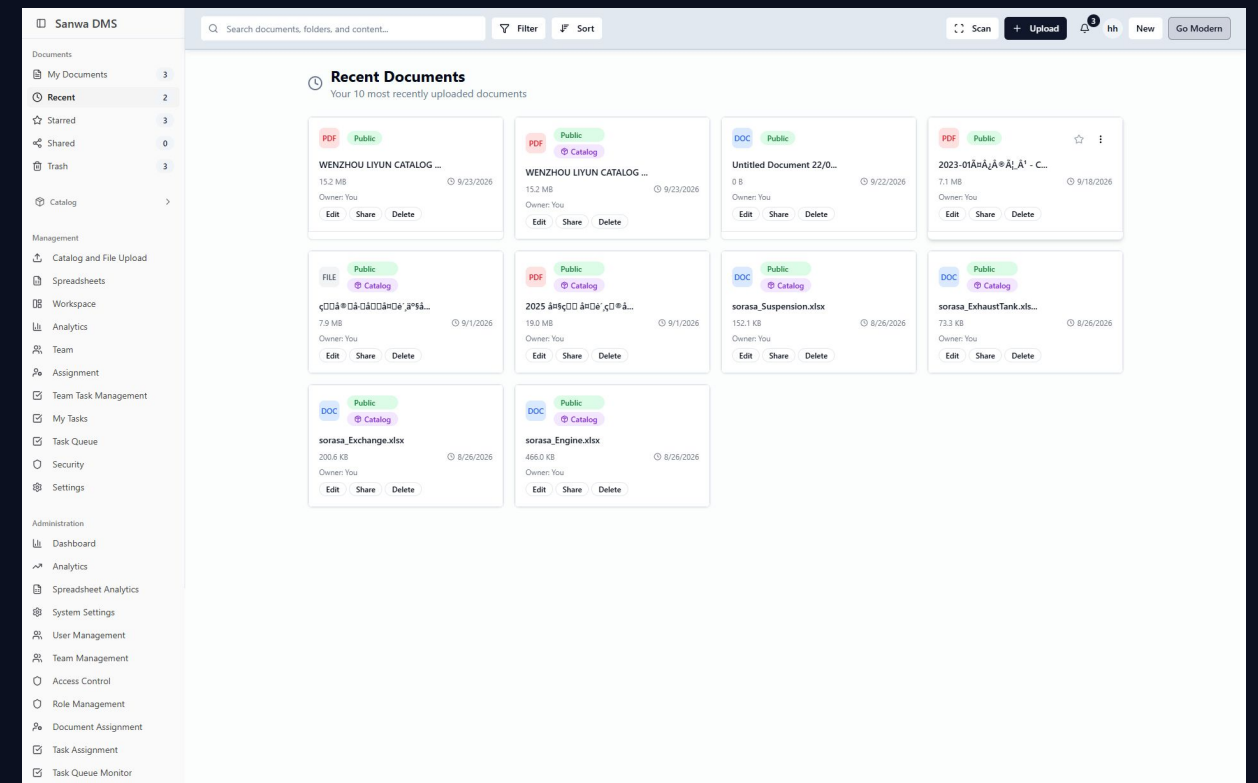
PREVIOUS INTERFACE

Home and recent documents

PREVIOUS UI / A



PREVIOUS UI / B

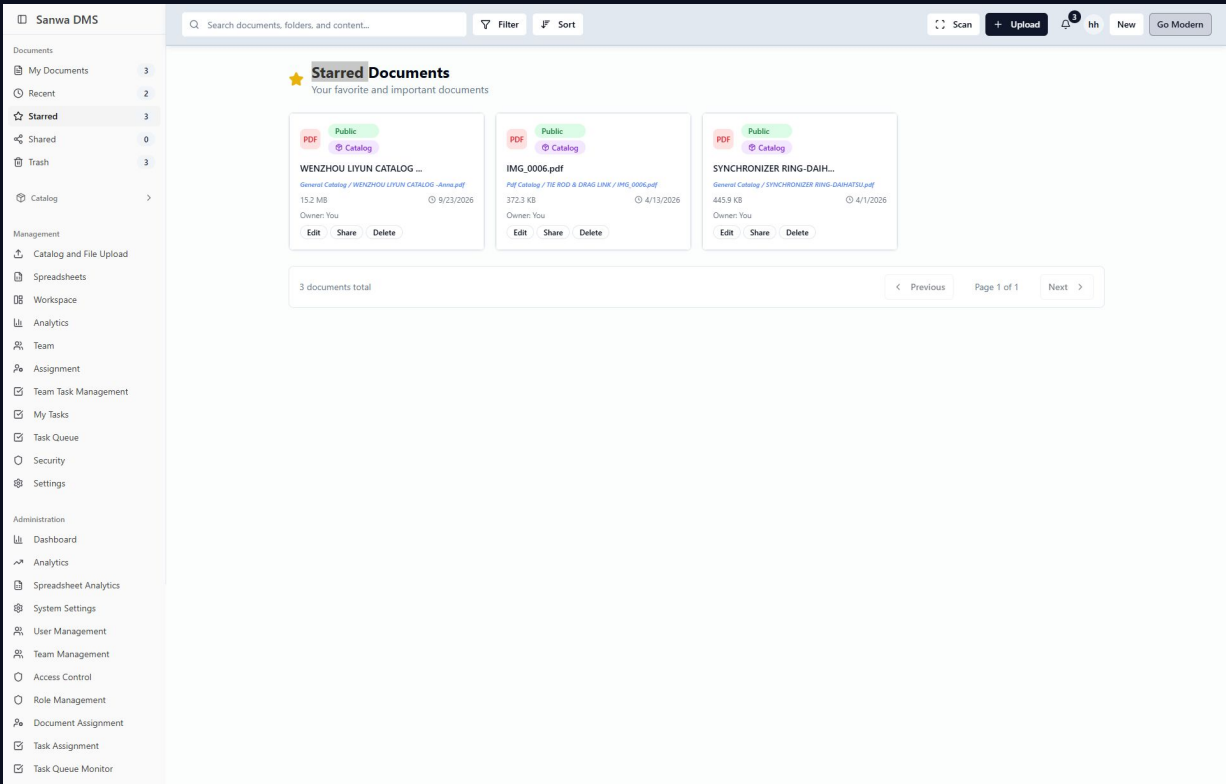


The dashboard and recent-file cards establish the document-centered starting point.

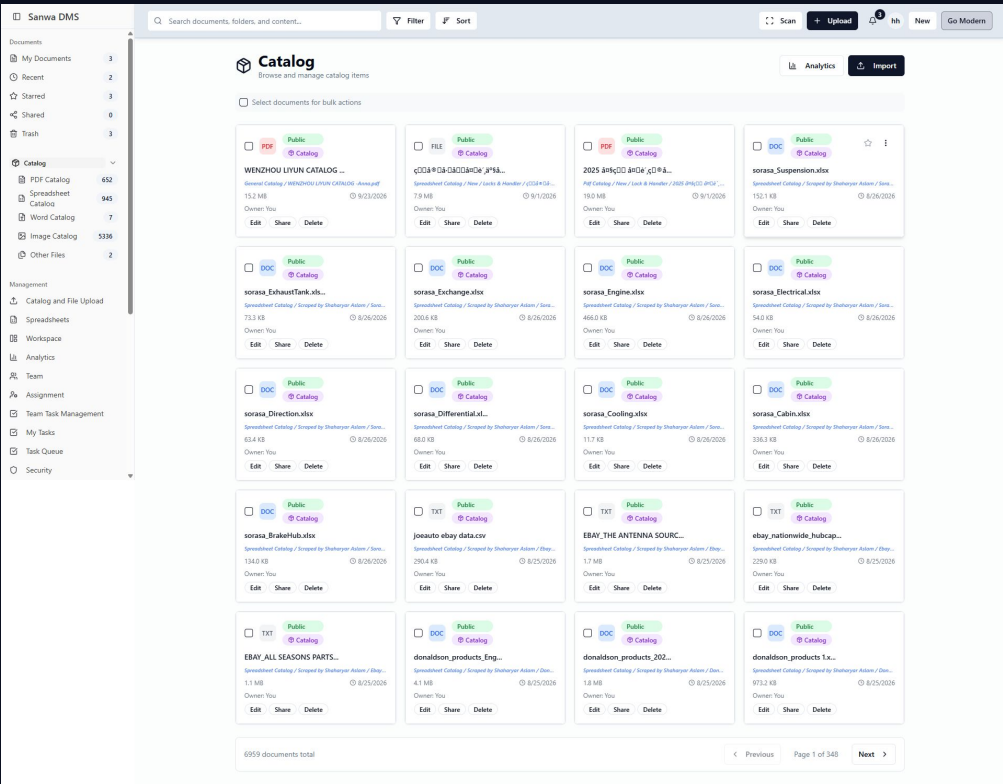
Opportunity: give returning users a stronger view of work awaiting action.

Starred files and catalog

PREVIOUS UI / A



PREVIOUS UI / B

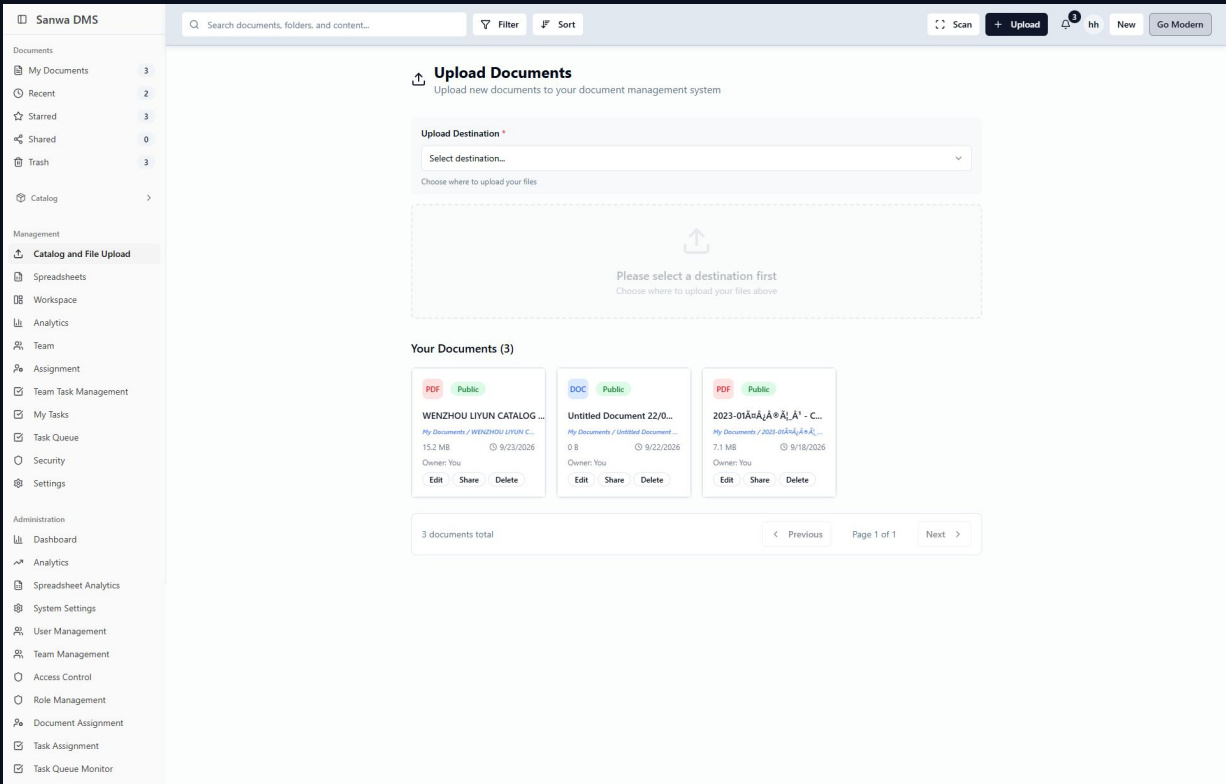


The previous UI already supports saved documents and a browsable catalog.

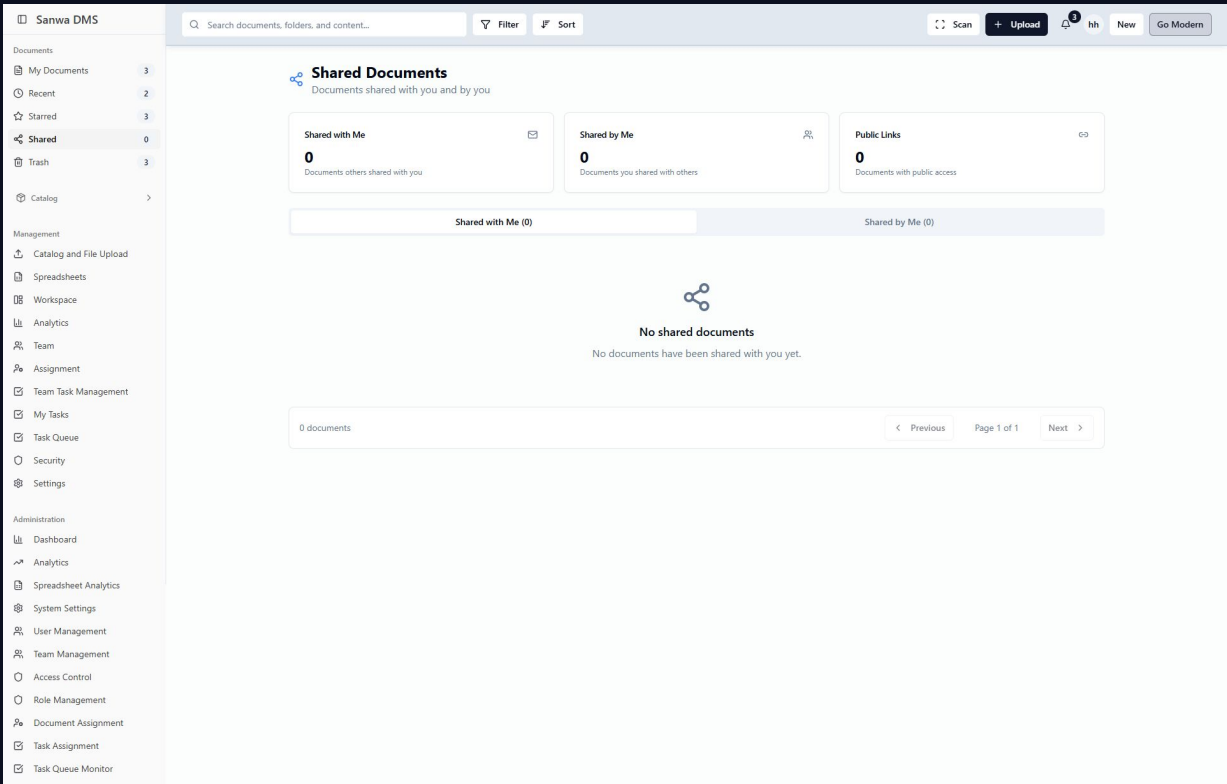
Opportunity: preserve familiar retrieval paths while clarifying hierarchy and metadata.

Upload and sharing

PREVIOUS UI / A



PREVIOUS UI / B



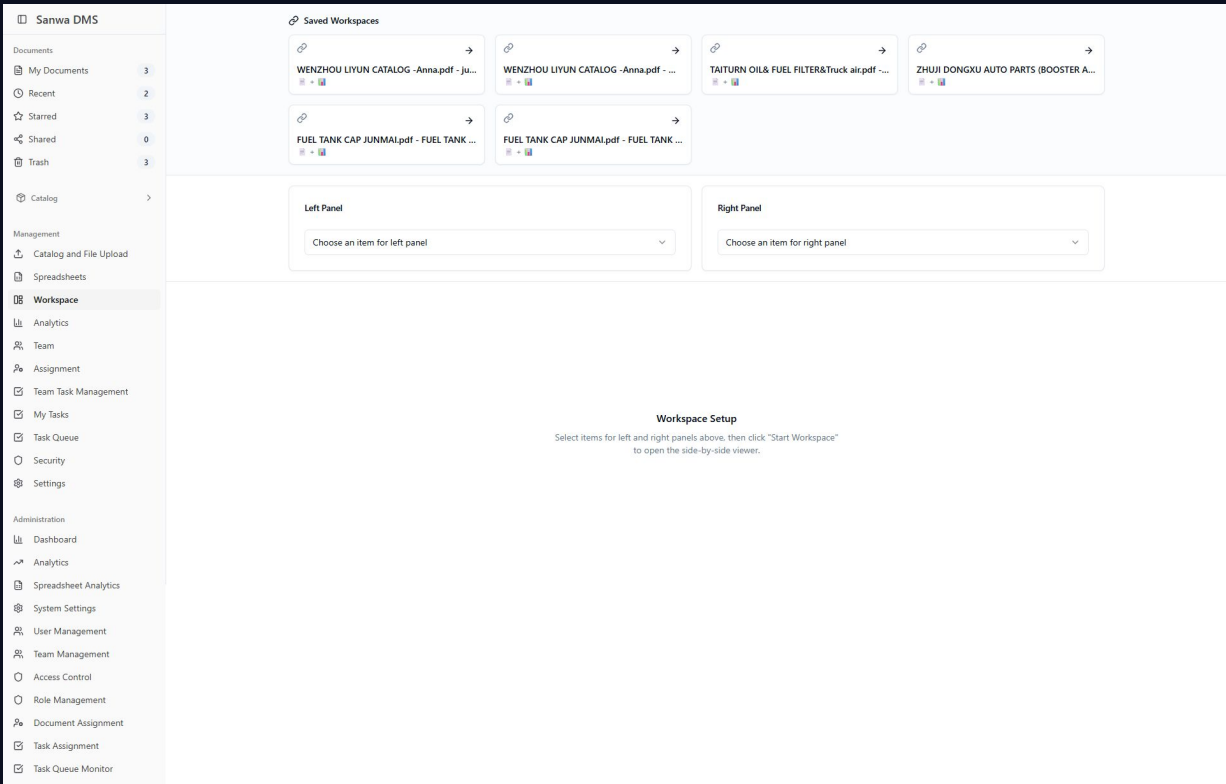
The old upload page uses a file-selection area. Sharing appears as a separate document table.

Opportunity: make destination, access and processing choices explicit before users commit.

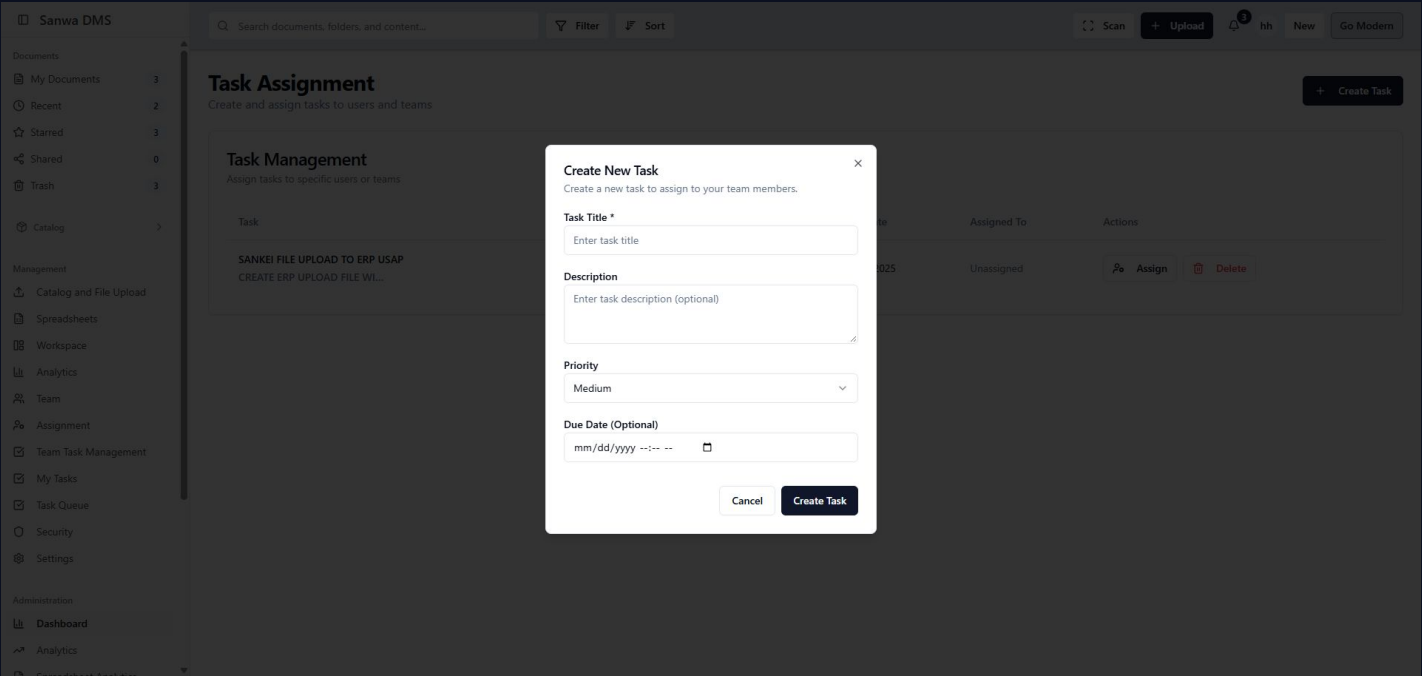
PREVIOUS INTERFACE

Workplace and task creation

PREVIOUS UI / A



PREVIOUS UI / B

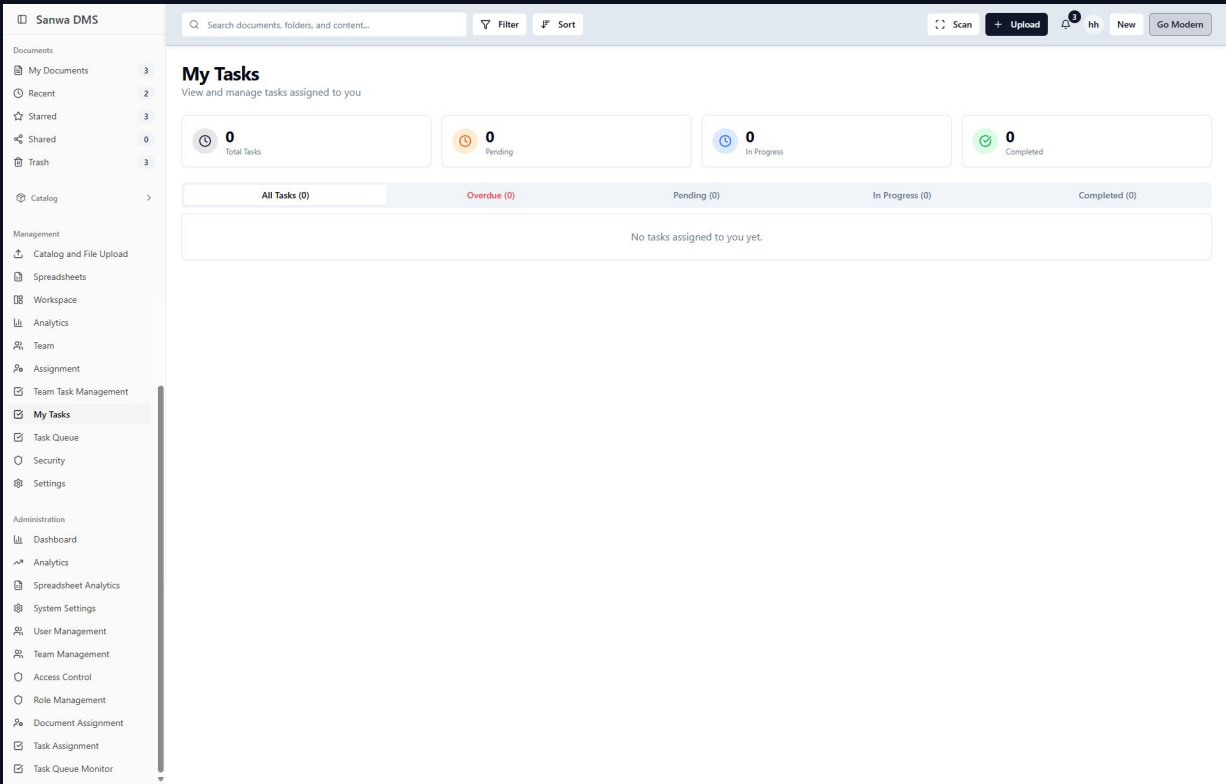


The workplace begins with document selection. Task creation uses a compact form.

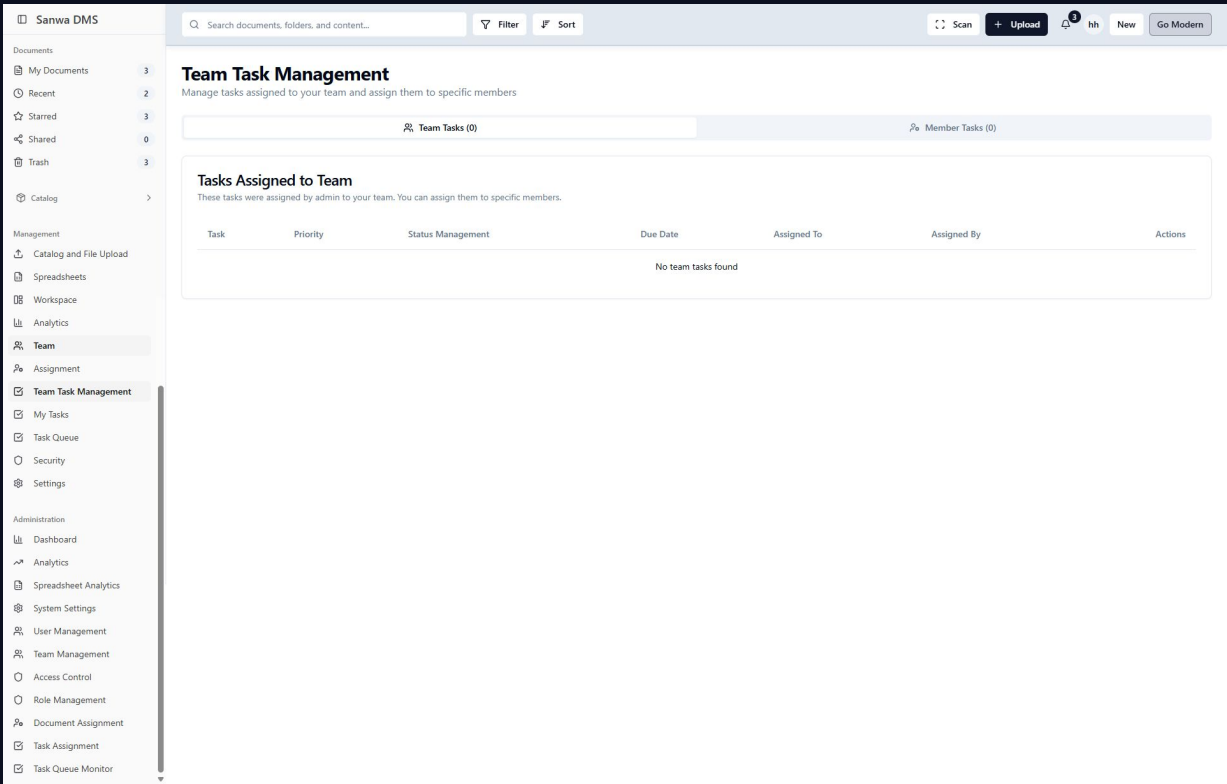
Opportunity: guide workspace setup and connect assignments to document context.

Personal and team tasks

PREVIOUS UI / A



PREVIOUS UI / B

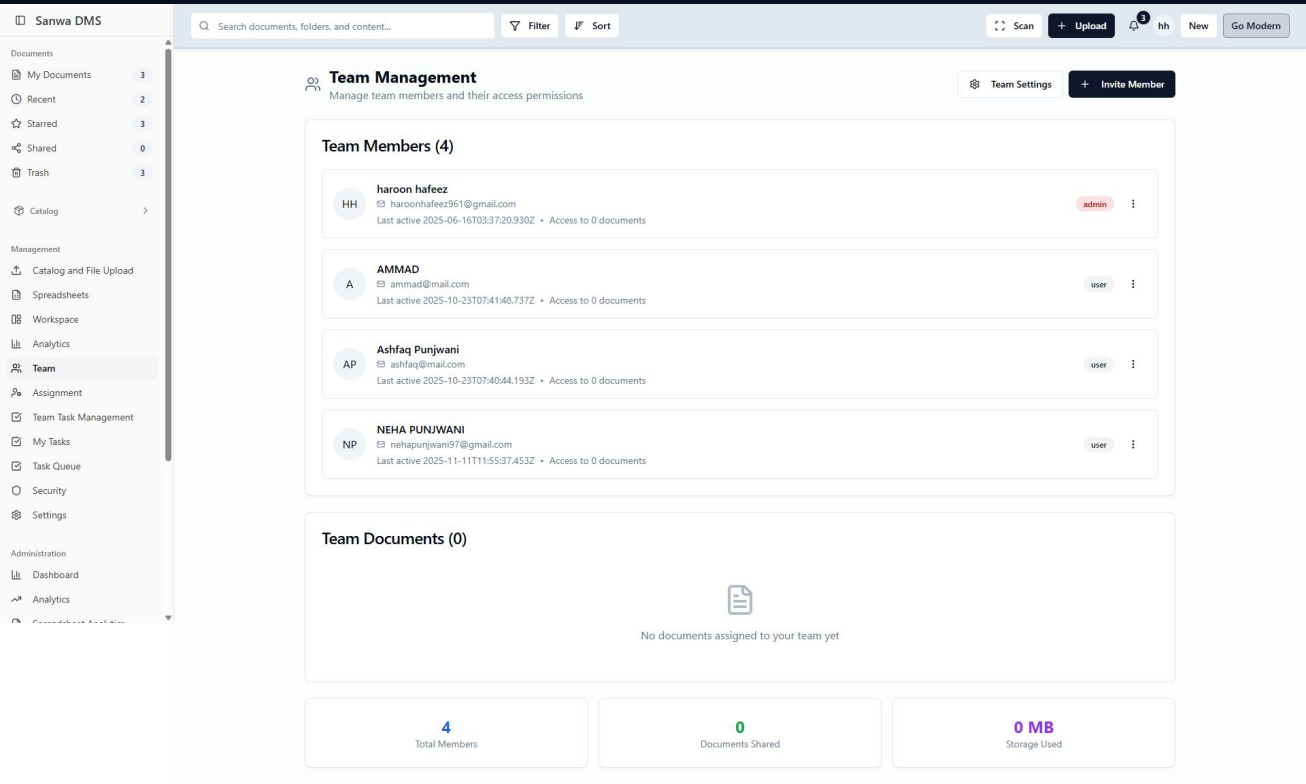


Personal and team task pages use sparse lists with summary counts.

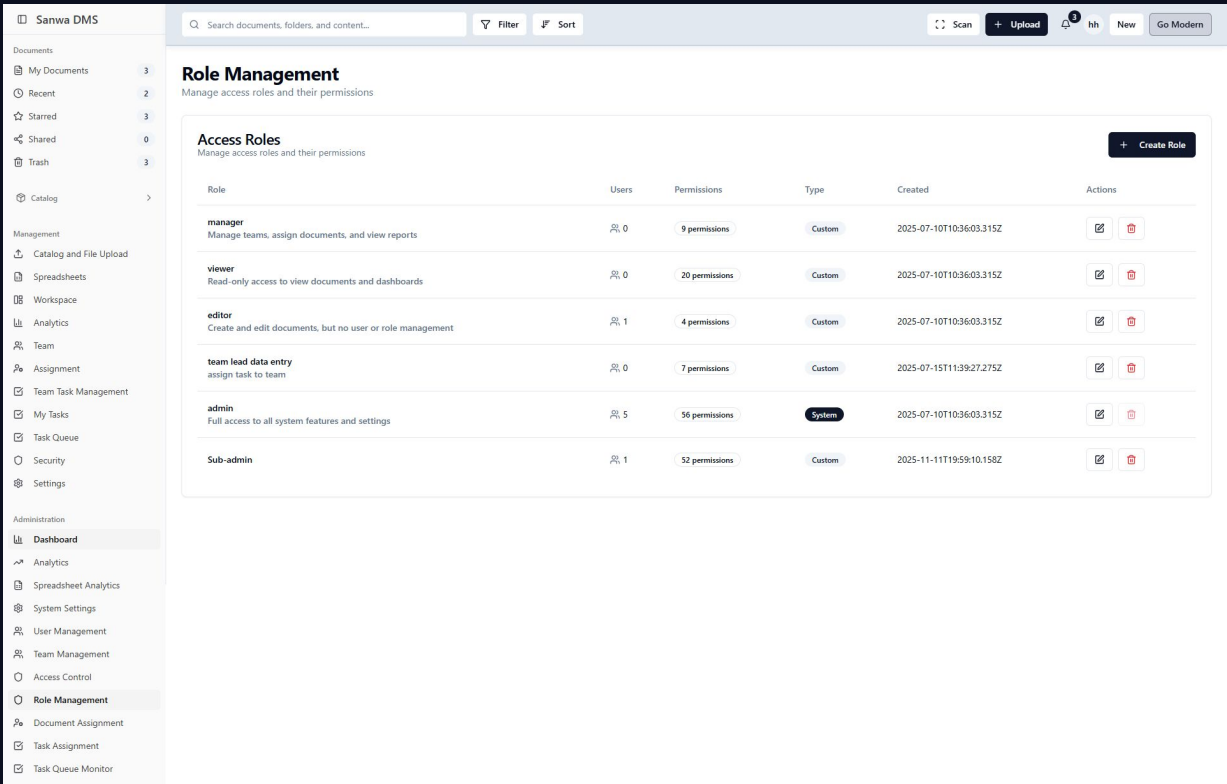
Opportunity: expose priority, ownership, progress and due dates within active work views.

Teams and roles

PREVIOUS UI / A



PREVIOUS UI / B



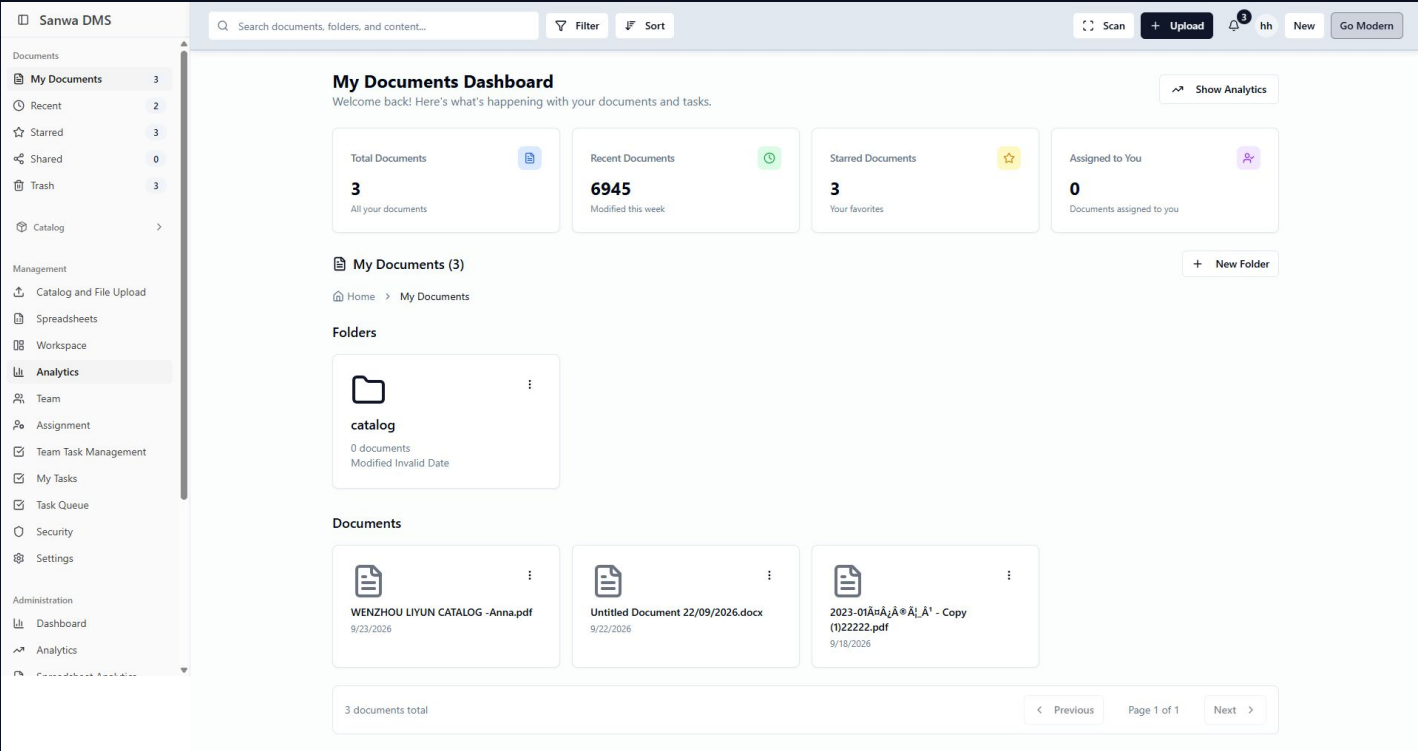
The team screen lists members. Role management presents administrative rows.

Opportunity: separate team coordination from access administration without losing their relationship.

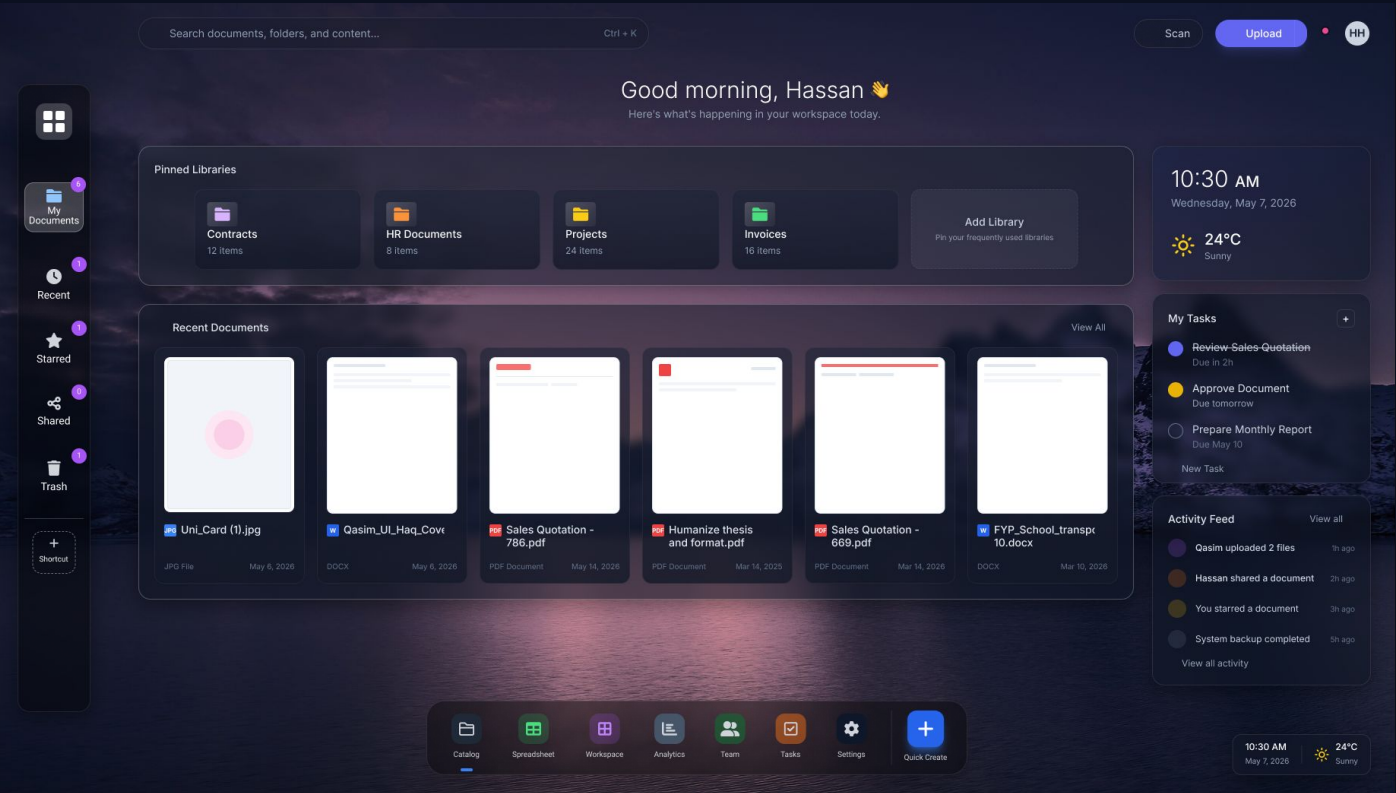
BEFORE AND AFTER

Home: overview becomes a desktop

PREVIOUS DESIGN



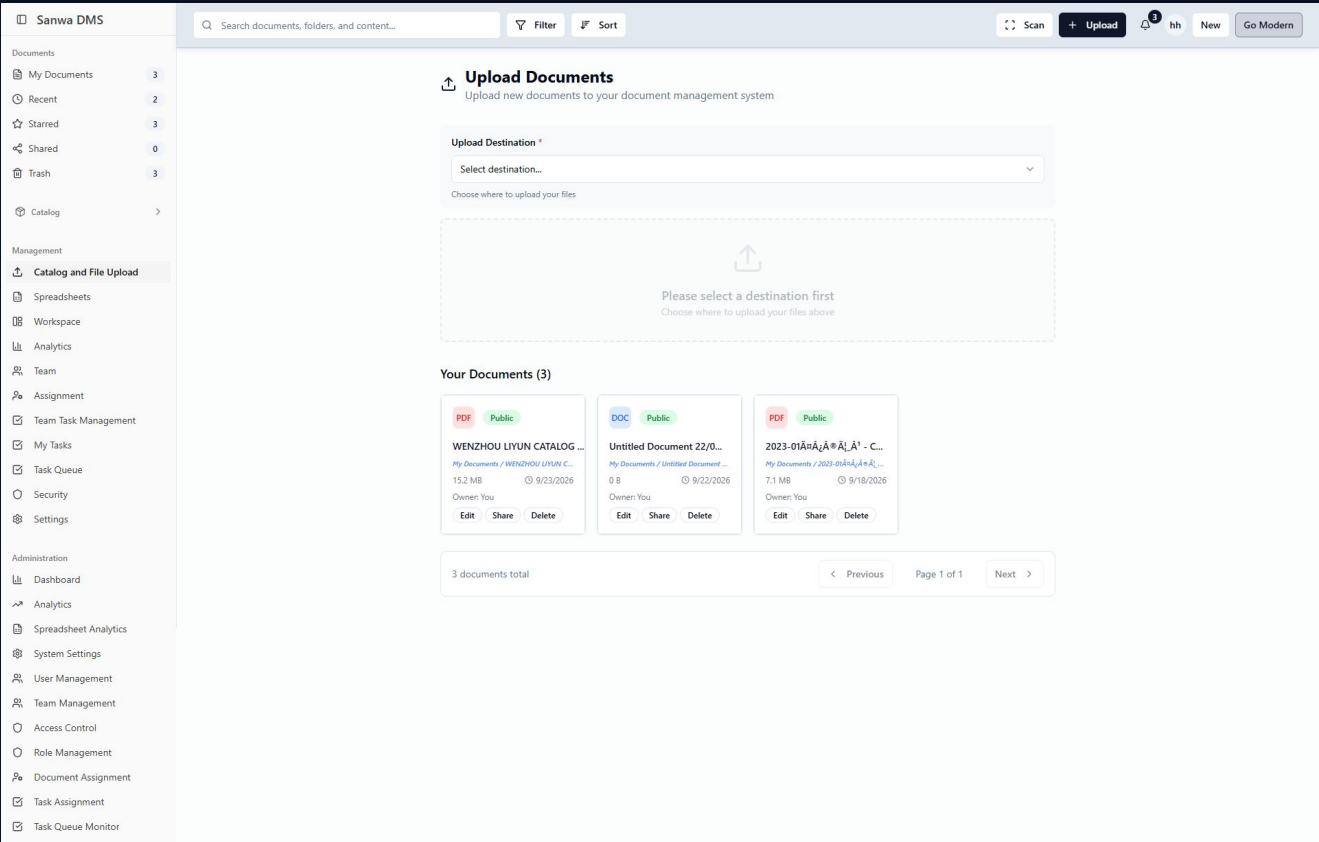
NEW DESIGN



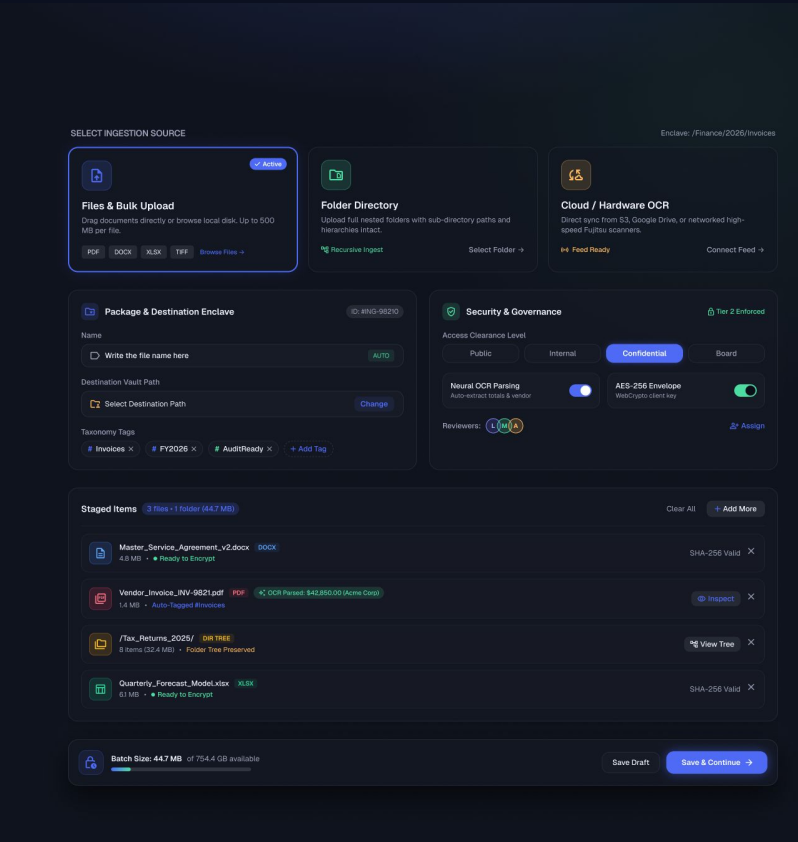
The previous dashboard centers on summary counts and recent documents. The new home adds a desktop shell, preview cards and a bottom dock.

Upload: more decisions before saving

PREVIOUS DESIGN



NEW DESIGN

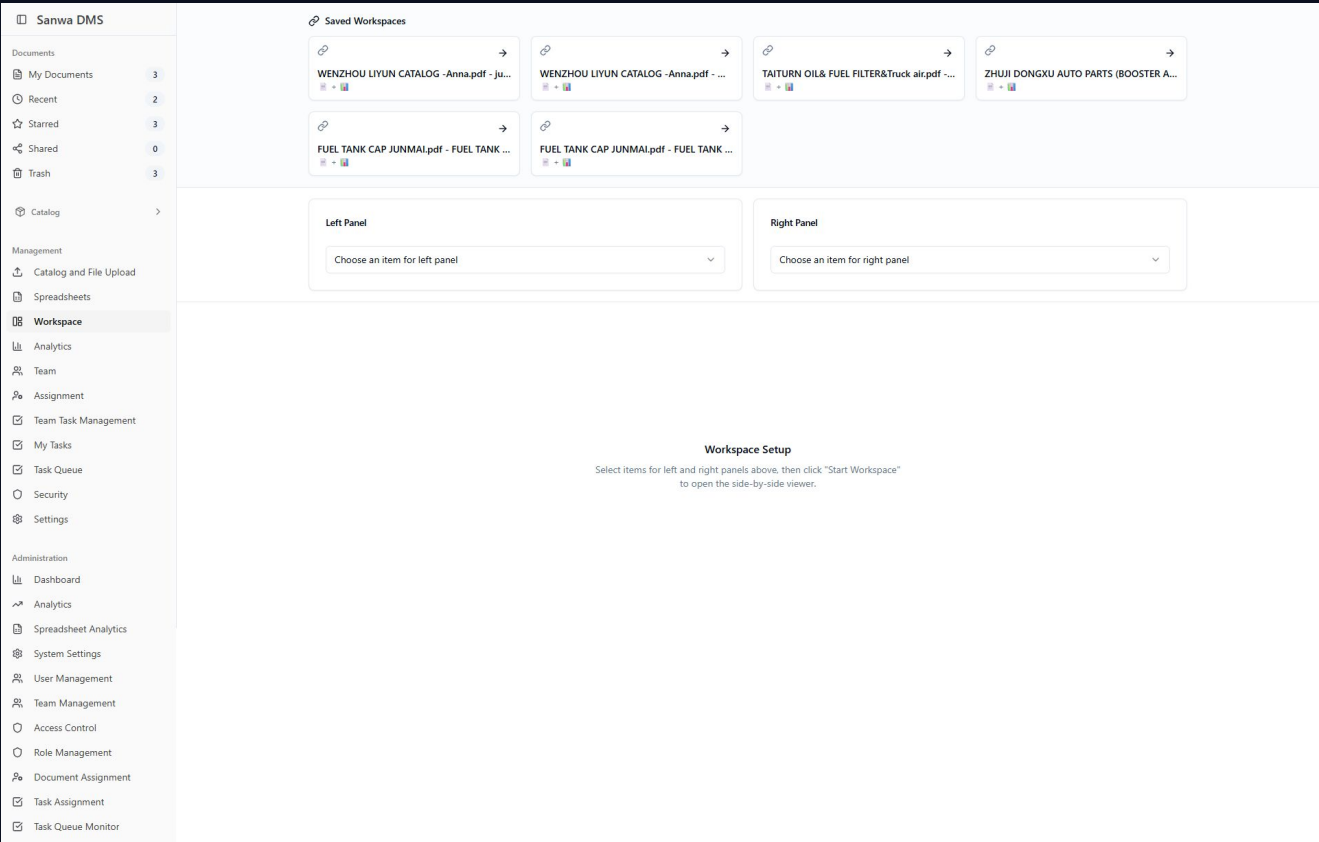


The new intake design adds source choices, destination, tags, security settings and a staged-file review.

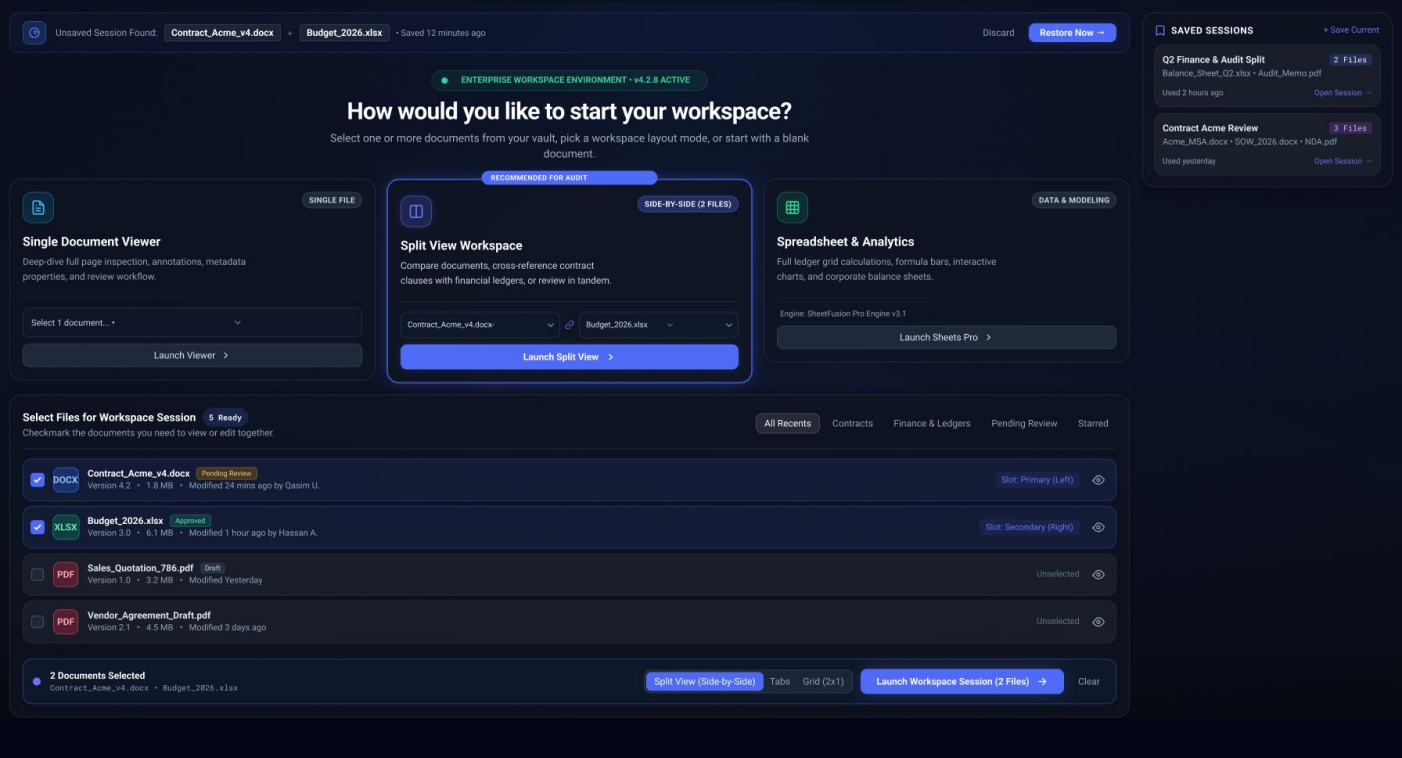
BEFORE AND AFTER

Workspace: an explicit setup flow

PREVIOUS DESIGN



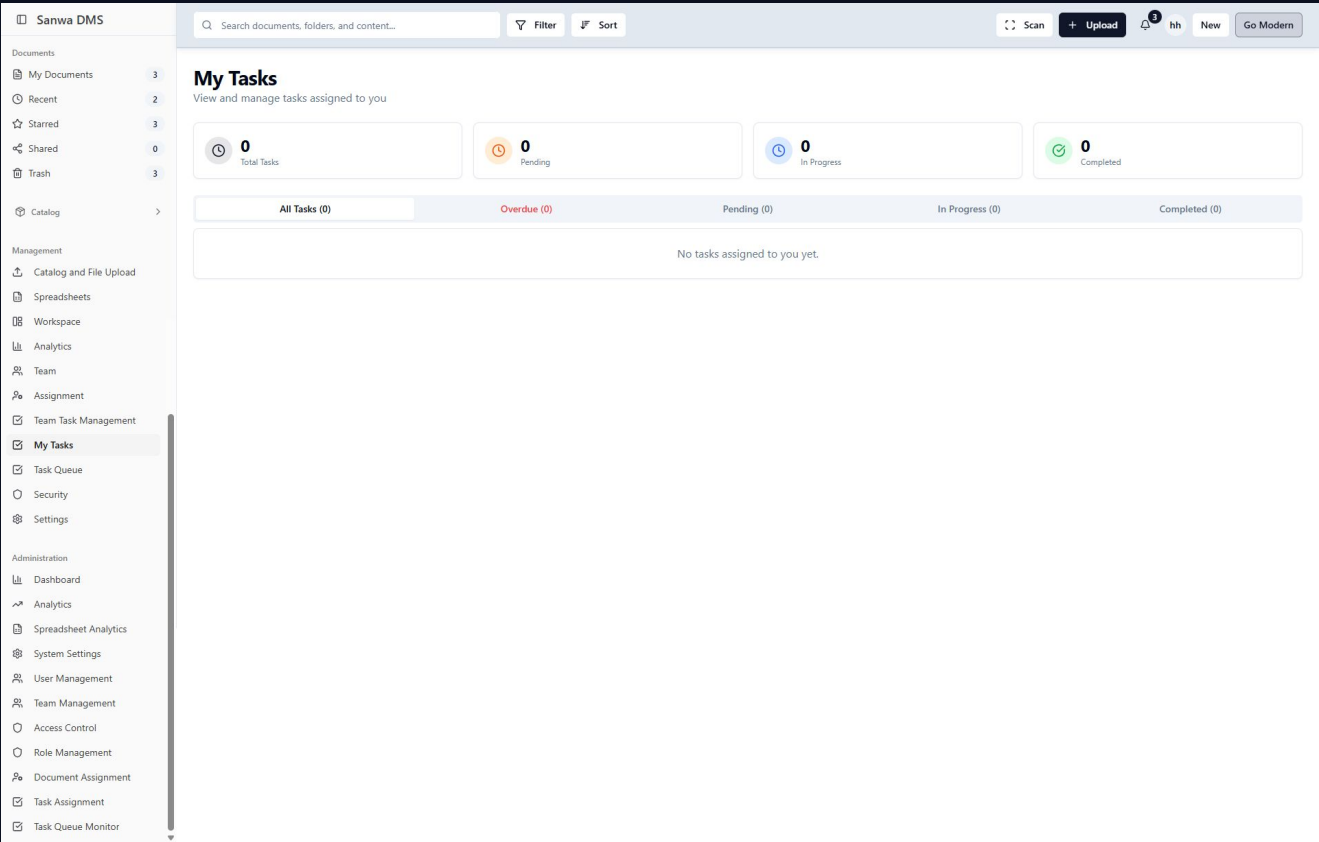
NEW DESIGN



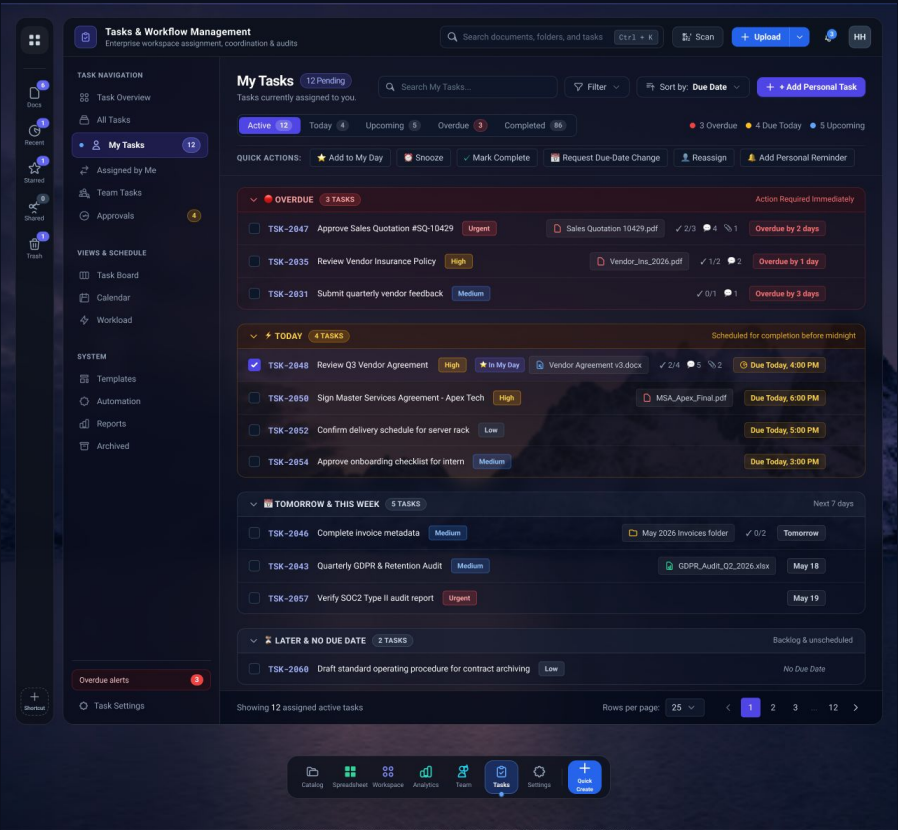
The new design presents layout modes, document slots and session recovery before launching work.

Personal tasks: richer assignment context

PREVIOUS DESIGN



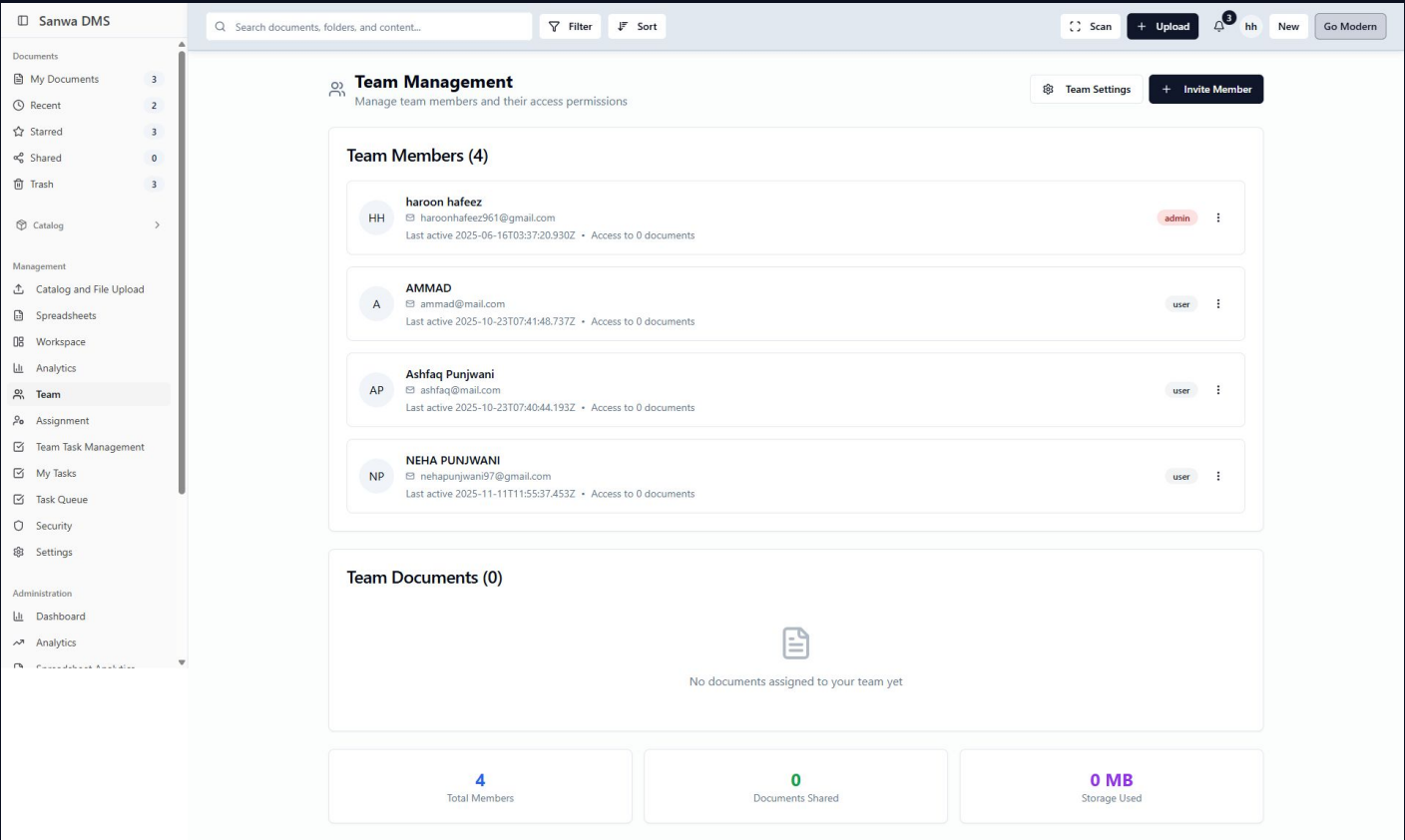
NEW DESIGN



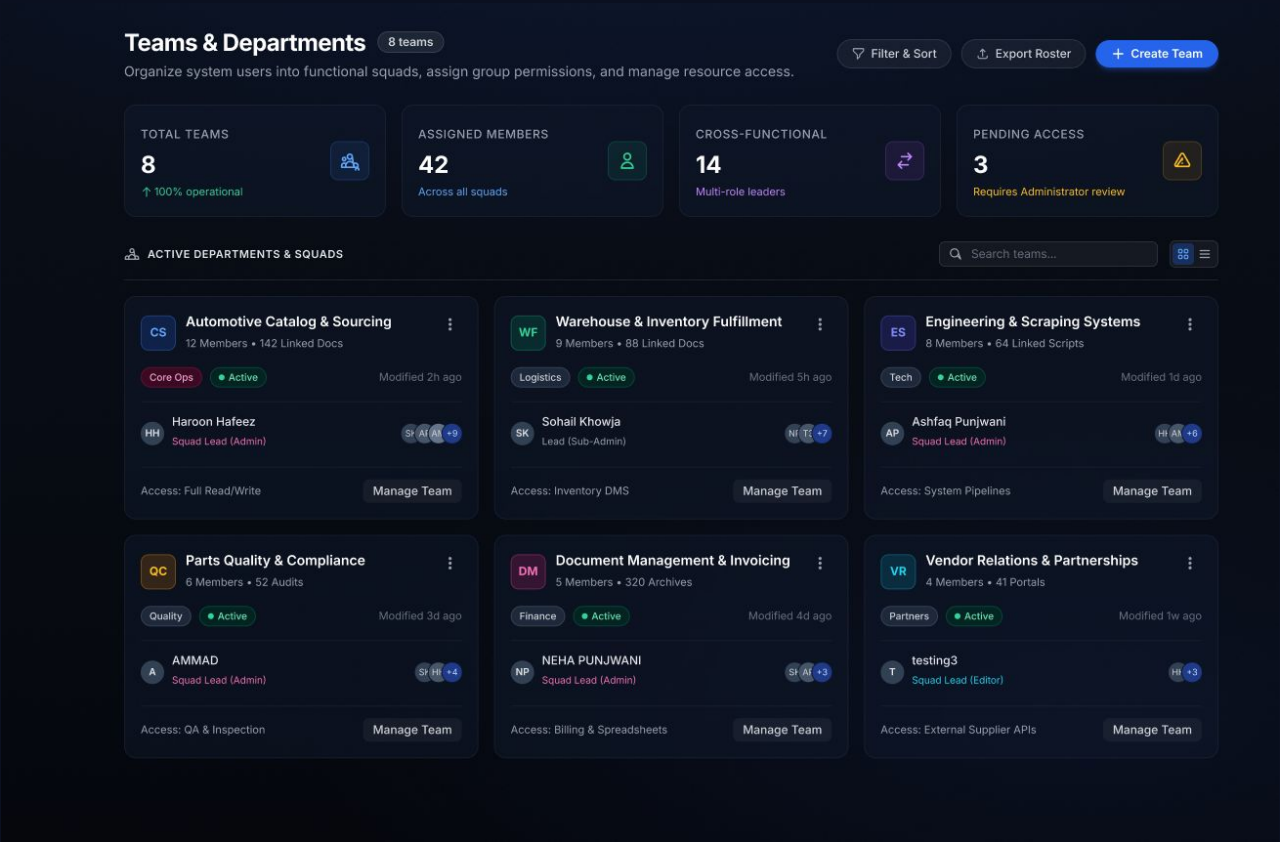
The redesign gives the personal queue more visible status and priority context, while retaining a dedicated view.

Teams: organization and coordination

PREVIOUS DESIGN



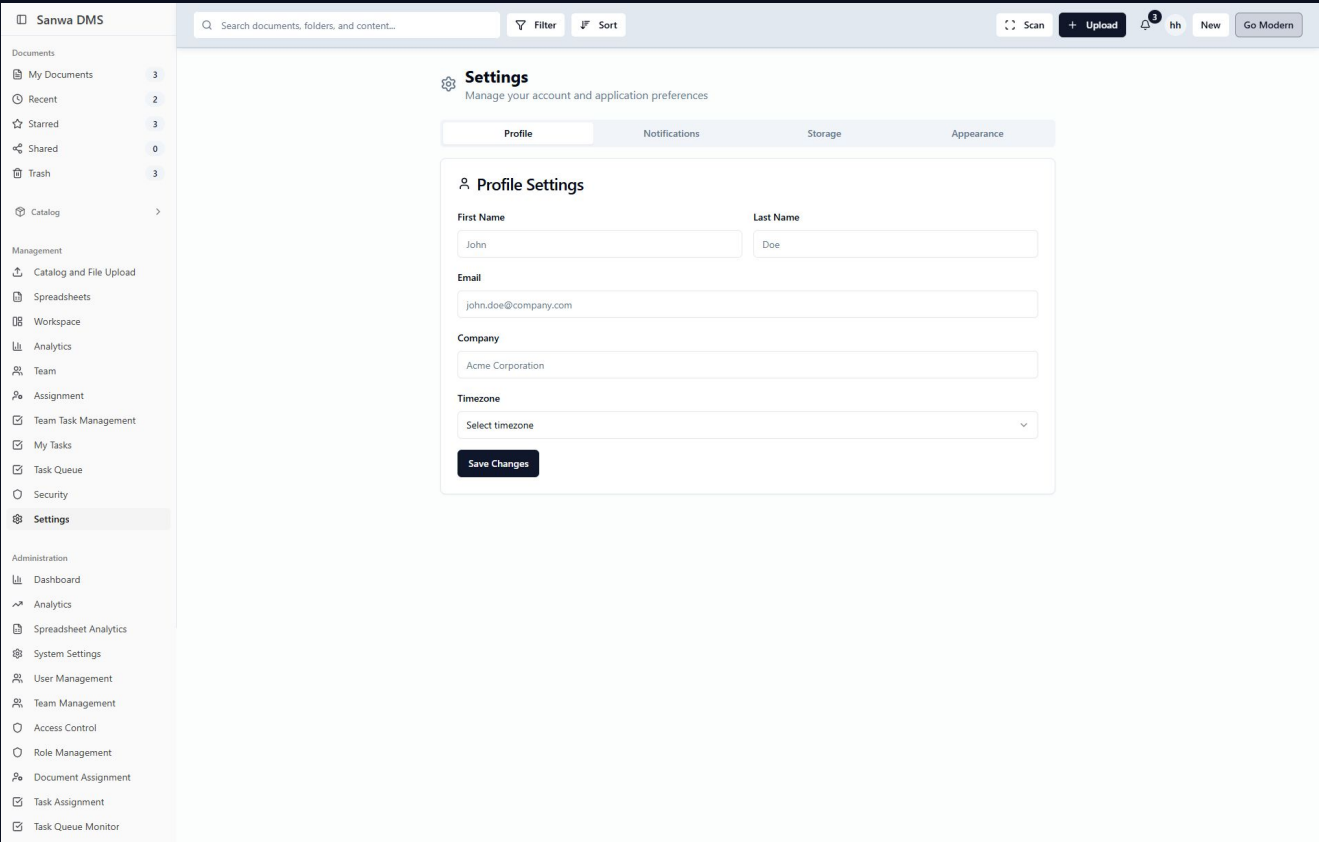
NEW DESIGN



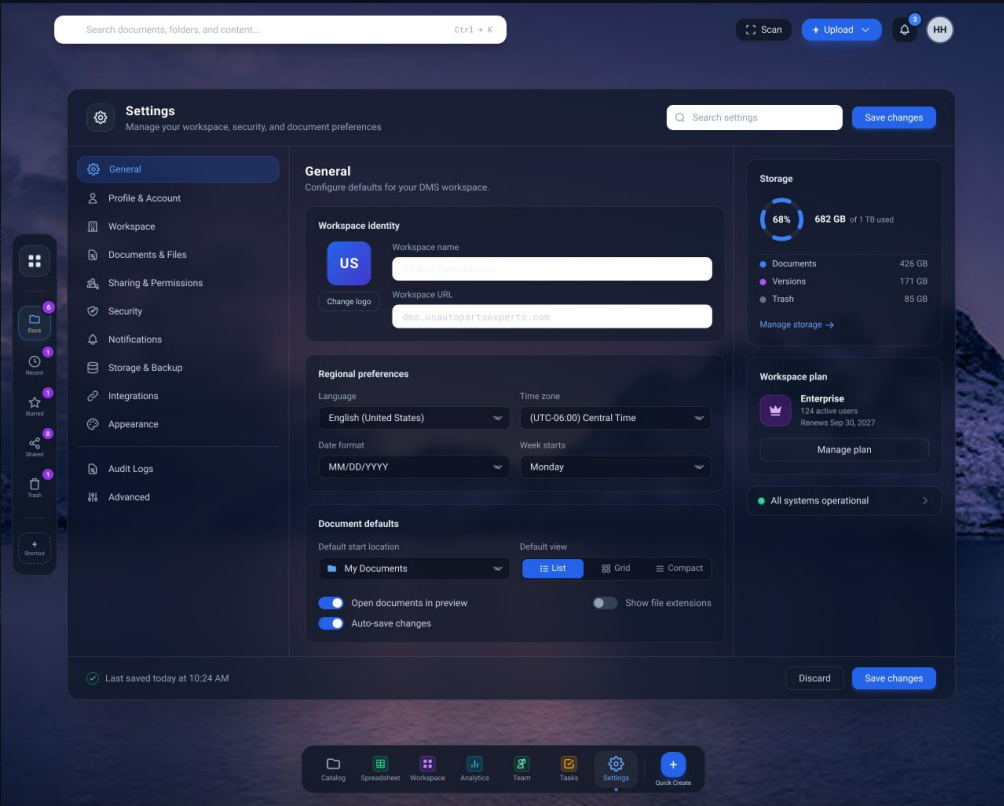
Team cards and summary information broaden the earlier member-list presentation.

Settings: a dedicated configuration system

PREVIOUS DESIGN



NEW DESIGN



The former small profile form gives way to a settings shell with separate administrative categories.

What changed across the product

Visual direction: a light application shell becomes a dark desktop workspace with translucent surfaces.

Workflow depth: creation screens expose supporting documents, responsibility and review context.

Information structure: task views and settings categories give different jobs dedicated places.

How the design organizes work

A shared shell anchors navigation, search and quick access across modules.

Overview screens summarize the current situation. Lists and boards support daily action.

Modals preserve the surrounding context when users create or inspect an item.

Detailed settings screens group configuration under recognizable domains.

Why these decisions matter

Visible status can help people decide what needs attention without opening every item.

Document-linked assignments can keep deliverables and responsibilities together.

Dedicated settings categories can make a large configuration surface easier to navigate.

These are intended usability benefits, rather than measured outcomes.

The visual system

Dark navy surfaces establish a shared environment for the new screens.

Blue and violet emphasize selections and primary actions. Green, amber and red distinguish states.

Sidebars, tab rows, tables and inspectors recur across modules.

Text labels should carry meaning alongside color, especially for status and priority.

A consistent entry experience

WHAT CHANGED

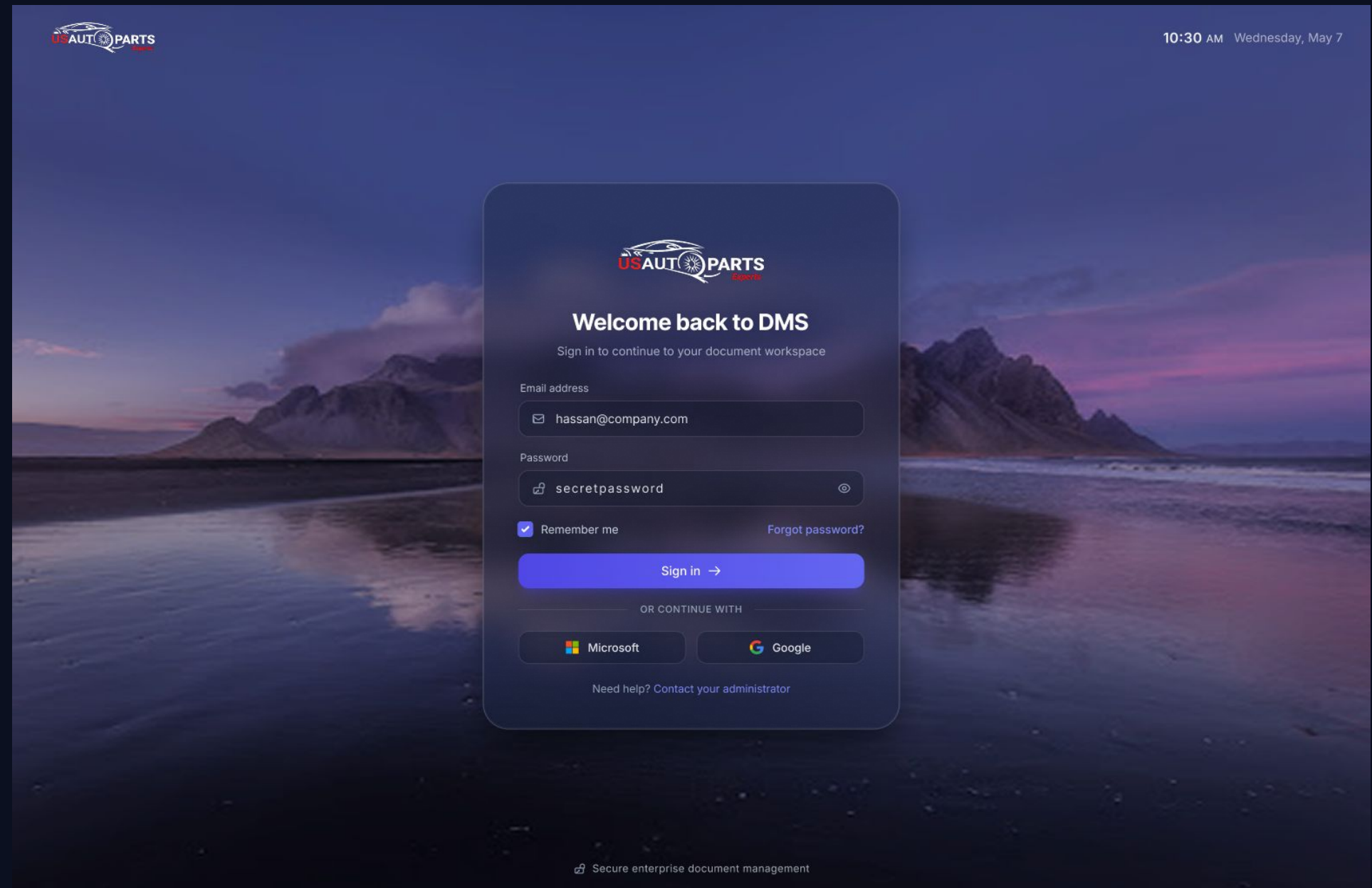
The login screen introduces the new visual identity before the workspace opens.

HOW THE DESIGN DOES IT

A central sign-in surface sits over a scenic background with a prominent primary action.

WHY IT MATTERS

A focused entry point can reduce competition between authentication and unrelated content.



Home as a working desktop

WHAT CHANGED

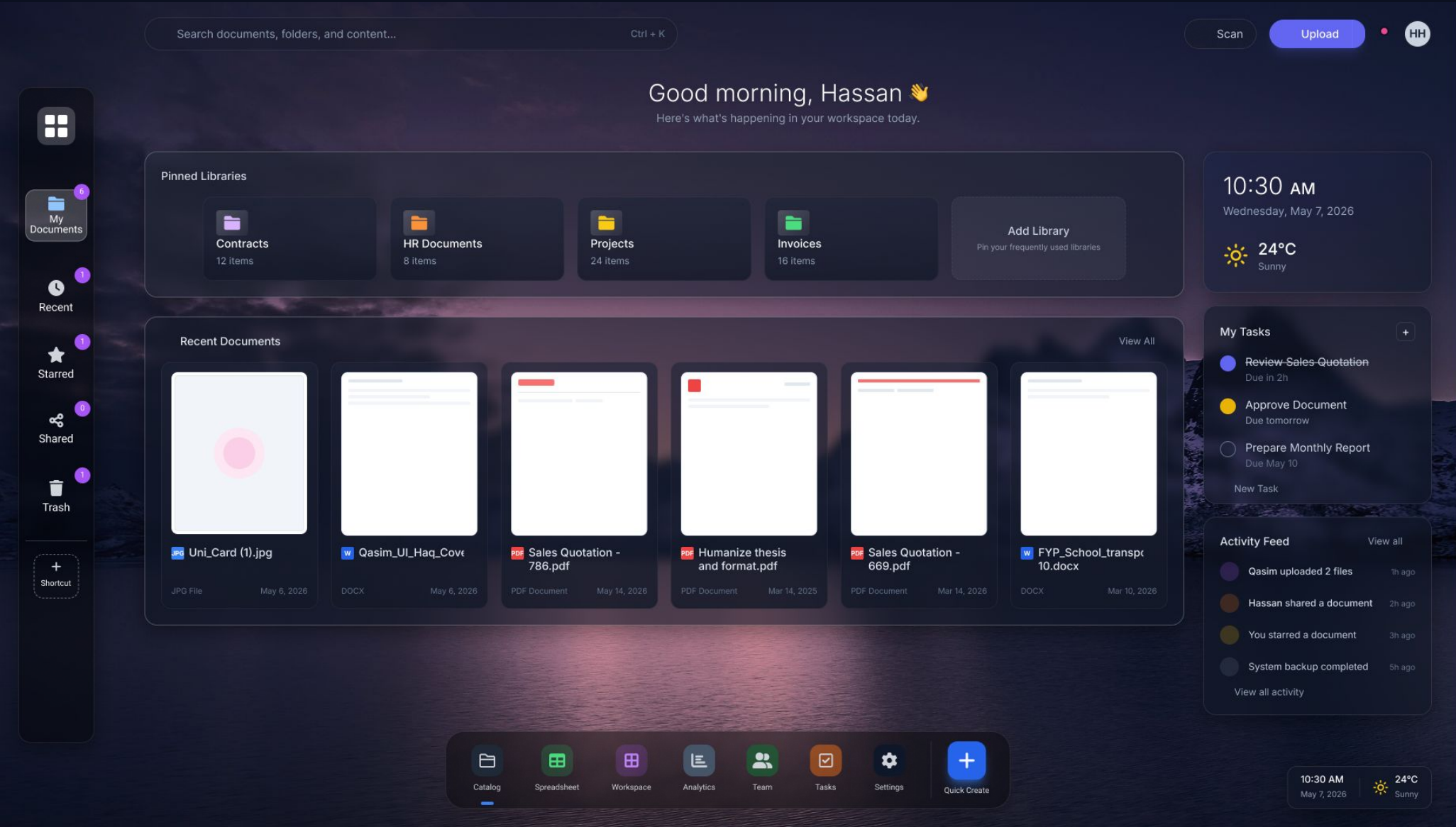
The dashboard combines a greeting, summary information and document previews.

HOW THE DESIGN DOES IT

A vertical navigation rail and bottom dock frame the main workspace.

WHY IT MATTERS

Frequent destinations and recent work remain visible when a user returns.



An application launcher

WHAT CHANGED

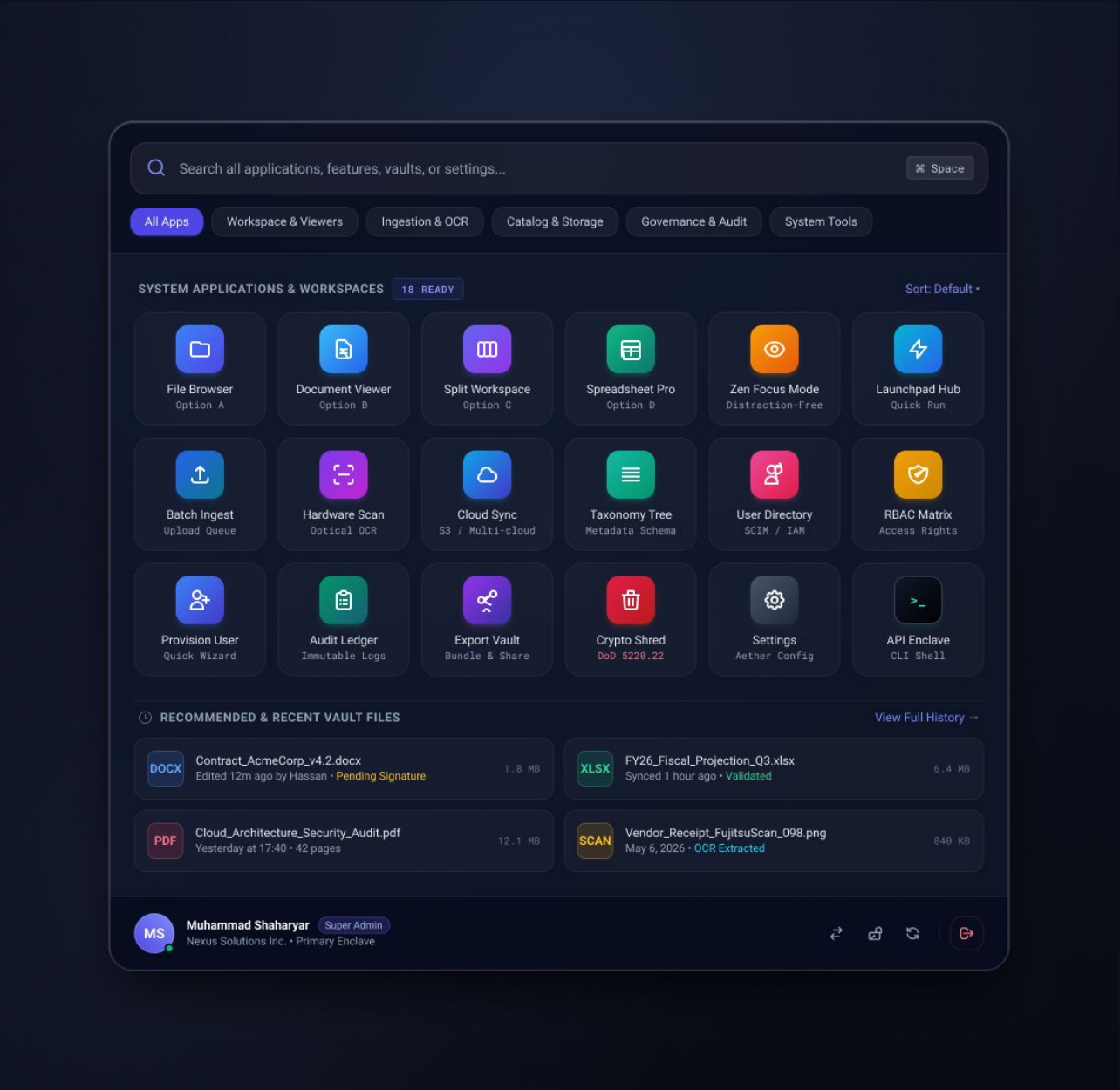
The design adds a searchable grid of tools and workspace destinations.

HOW THE DESIGN DOES IT

Category filters sit above the app grid. Recent files and account controls sit below it.

WHY IT MATTERS

A launcher offers a second route to features when a sidebar alone becomes hard to scan.



Account controls within reach

WHAT CHANGED

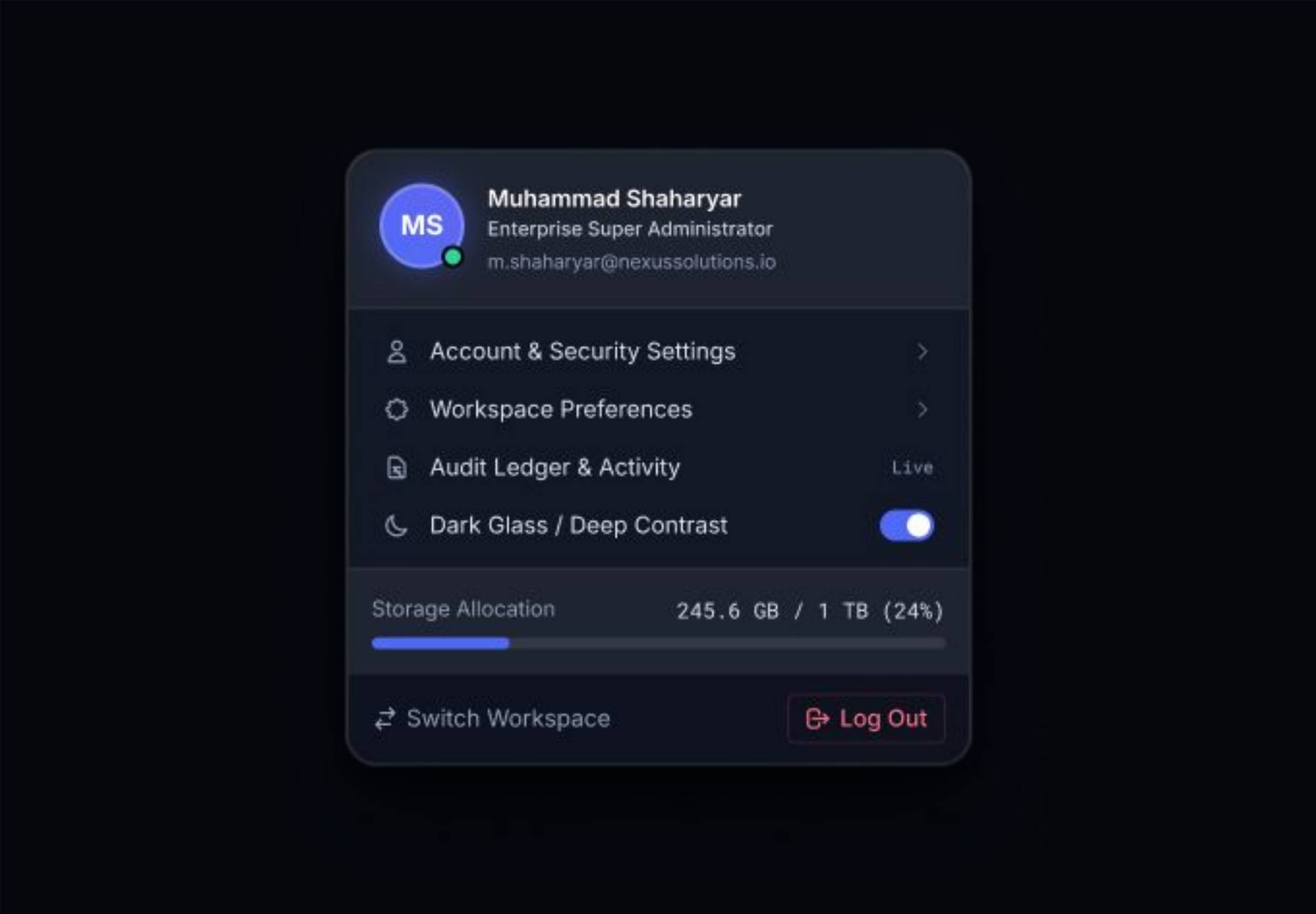
A compact profile menu brings account and session actions together.

HOW THE DESIGN DOES IT

Identity, preferences, storage information and sign-out share one local surface.

WHY IT MATTERS

Users can manage their current account without leaving the working context first.



Workspace setup before launch

WHAT CHANGED

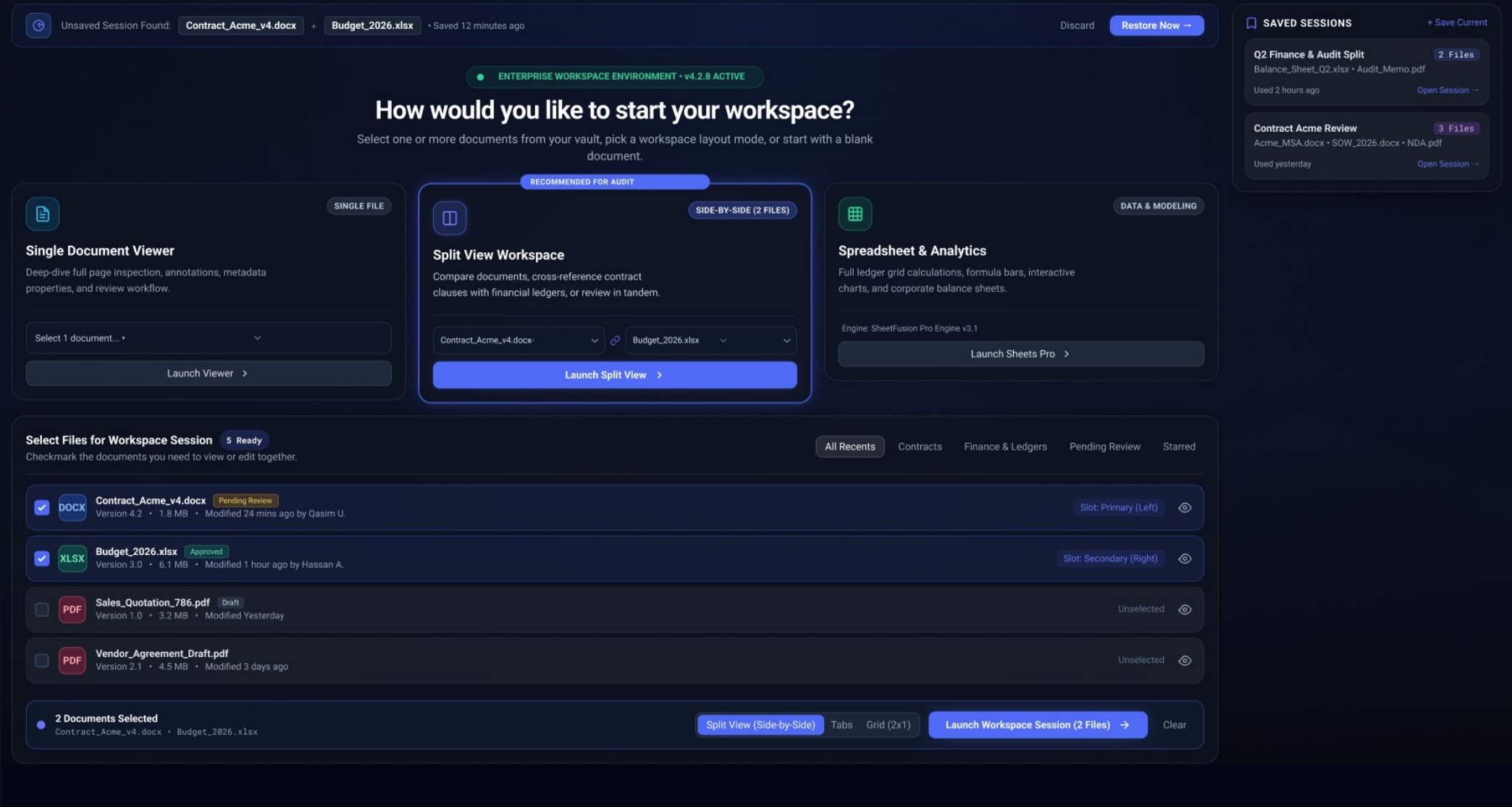
The new setup screen exposes single-document, split-view and spreadsheet options.

HOW THE DESIGN DOES IT

Selected files have visible slots. Saved sessions and a restore action support continuity.

WHY IT MATTERS

Users can choose a layout that fits the job before opening their documents.



Documents side by side

WHAT CHANGED

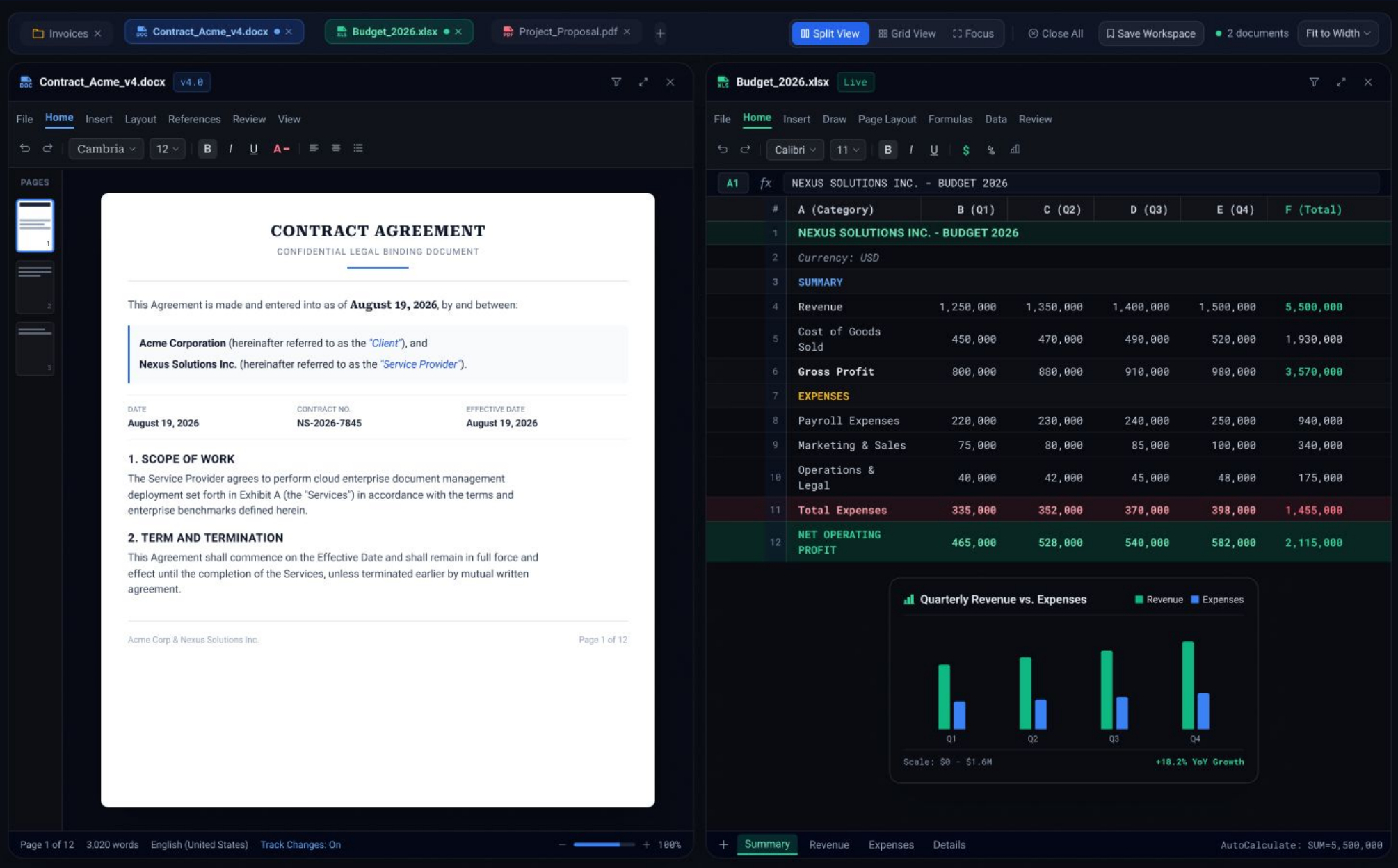
The workspace places a contract and spreadsheet in adjacent panes.

HOW THE DESIGN DOES IT

Document tabs, per-pane toolbars and workspace layout controls frame both files.

WHY IT MATTERS

Comparing related files in one view can reduce repeated switching between documents.



Upload with explicit context

WHAT CHANGED

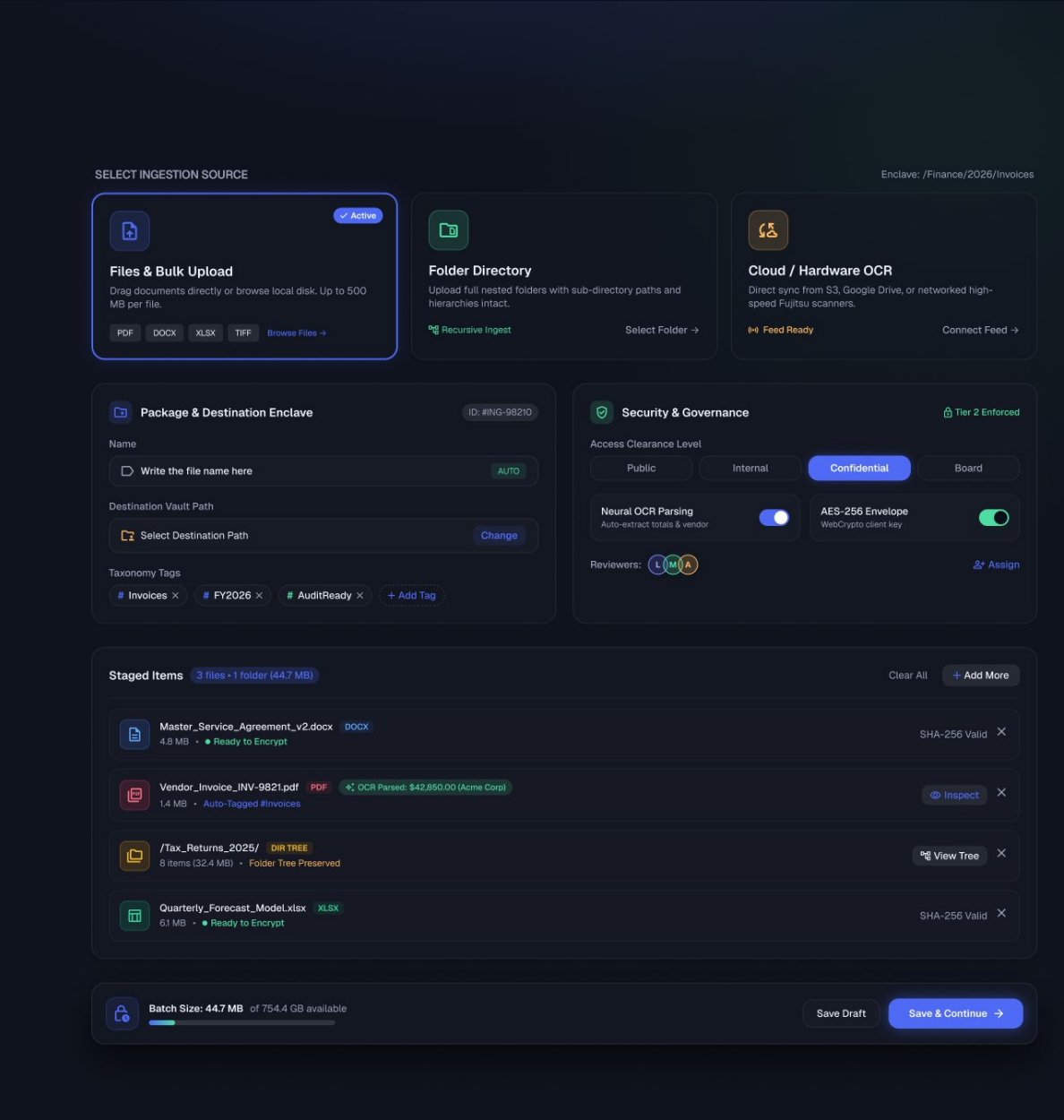
The ingestion design exposes files, folders and cloud or scanner sources.

HOW THE DESIGN DOES IT

Destination, tags and access choices appear before the staged-file list and continue action.

WHY IT MATTERS

The design brings important classification choices into the intake workflow.



A dedicated sharing workspace

WHAT CHANGED

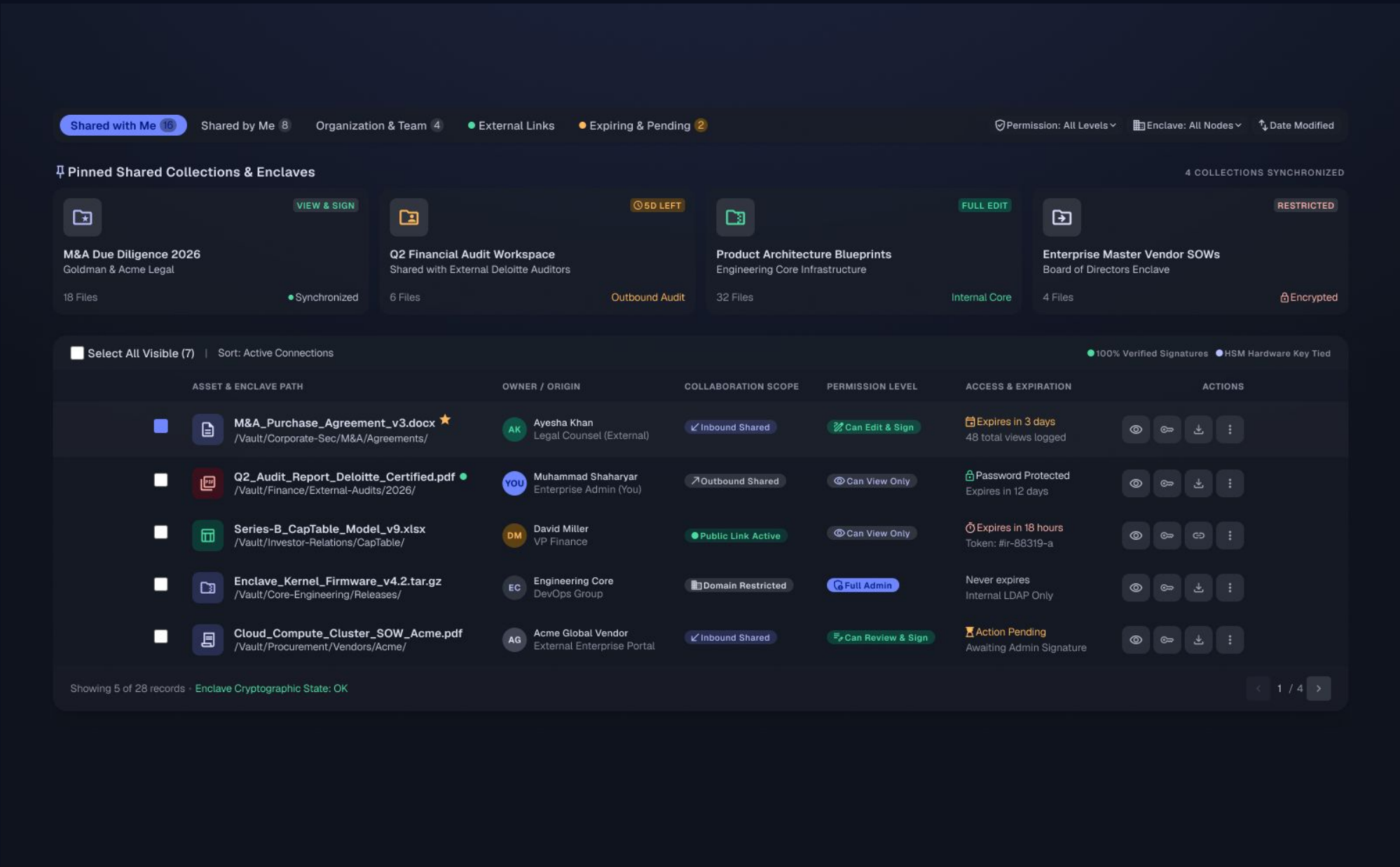
The new sharing screen combines summary information with a document-and-link table.

HOW THE DESIGN DOES IT

Rows expose state and contextual actions beneath filters and grouped navigation.

WHY IT MATTERS

Shared access becomes a reviewable work area rather than a disconnected sharing action.



Teams and departments

WHAT CHANGED

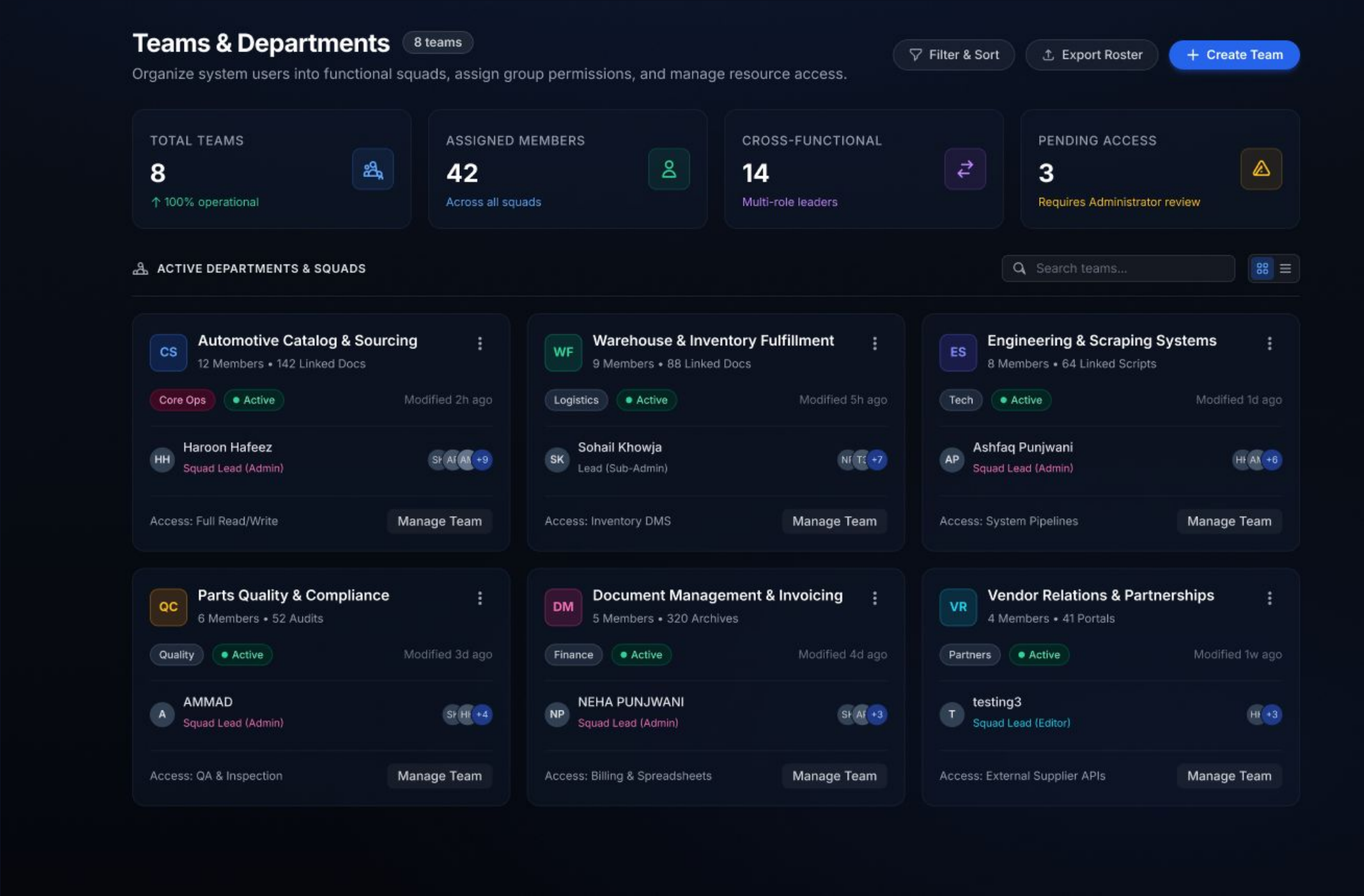
The redesign presents teams as operational groups with visible membership context.

HOW THE DESIGN DOES IT

Summary counts precede team cards and member previews. Creation remains easy to locate.

WHY IT MATTERS

People can inspect the organization of work before drilling into individual records.



Team creation with ownership

WHAT CHANGED

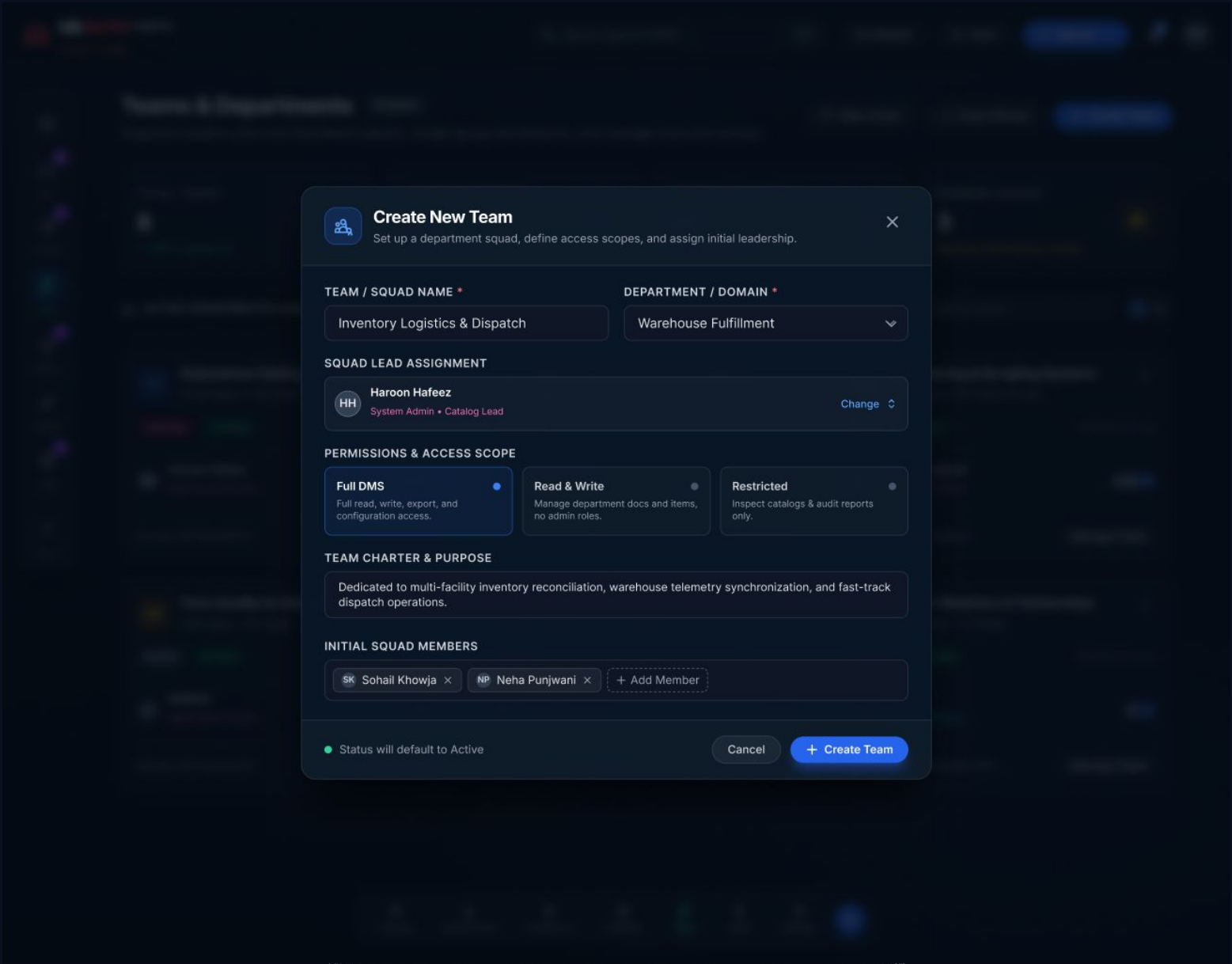
The new-team modal includes department, leader, access scope and initial members.

HOW THE DESIGN DOES IT

Related setup decisions appear together, with an explicit creation action at the bottom.

WHY IT MATTERS

A team begins with responsibility and membership defined in the same workflow.



Catalog and routing automation

WHAT CHANGED

A tabular automation view adds visible rule states and actions.

HOW THE DESIGN DOES IT

Rule rows use a shared structure under a focused automation heading.

WHY IT MATTERS

Administrators can inspect multiple routing definitions consistently. Execution still needs validation.

DMS Workspace > Teams & Departments > Automotive Catalog & Sourcing

Automotive Catalog & Sourcing

12 members

Active Team

Manage team roster, assign team-level permissions, document access scopes, and designate operational leads for OEM parts cataloging.

Team Settings

Manage Permissions

Add Member

Members12

Assigned Documents240

Roles & Access Matrices

Activity Audit Log

Pending Requests2

TEAM MEMBERS & ASSIGNED ROLES

Search members by name, email, or role...

Role: All

Sort

	USER	TEAM ROLE	SYSTEM ROLE	ACCESS LEVEL	STATUS	JOINED DMS	ACTIONS
☐	HH haroon hafeez haroonhafeez961@gmail.com	Team Lead	Admin	Full Access	Active	6/16/2025	
☐	SK Sohail Khowja sakhoja@msn.com	Co-Lead	Sub-Admin	Read & Write	Active	3/3/2026	
☐	A AMMAD ammad@mail.com	Specialist	Admin	Full Access	Active	10/23/2025	
☐	AP Ashfaq Punjwani ashfaq@mail.com	Data Tech	Admin	Full Access	Active	10/23/2025	
☐	NP NEHA PUNJWANI nehapunjwani97@gmail.com	QA Lead	Admin	Full Access	Active	11/11/2025	
☐	T testing3 test3@gmail.com	Content Editor	Editor	Read & Write	Active	9/10/2026	
☐	TM Tariq Mehmood tariq.m@autoparts.com	Sourcing Associate	Editor	Read Only	Active	1/14/2026	
☐	SJ Sarah Jenkins sarah.j@autoparts.com	Inventory Analyst	Editor	Read & Write	Active	2/01/2026	

Showing 8 of 12 members

<

1

2

>

Department workload

WHAT CHANGED

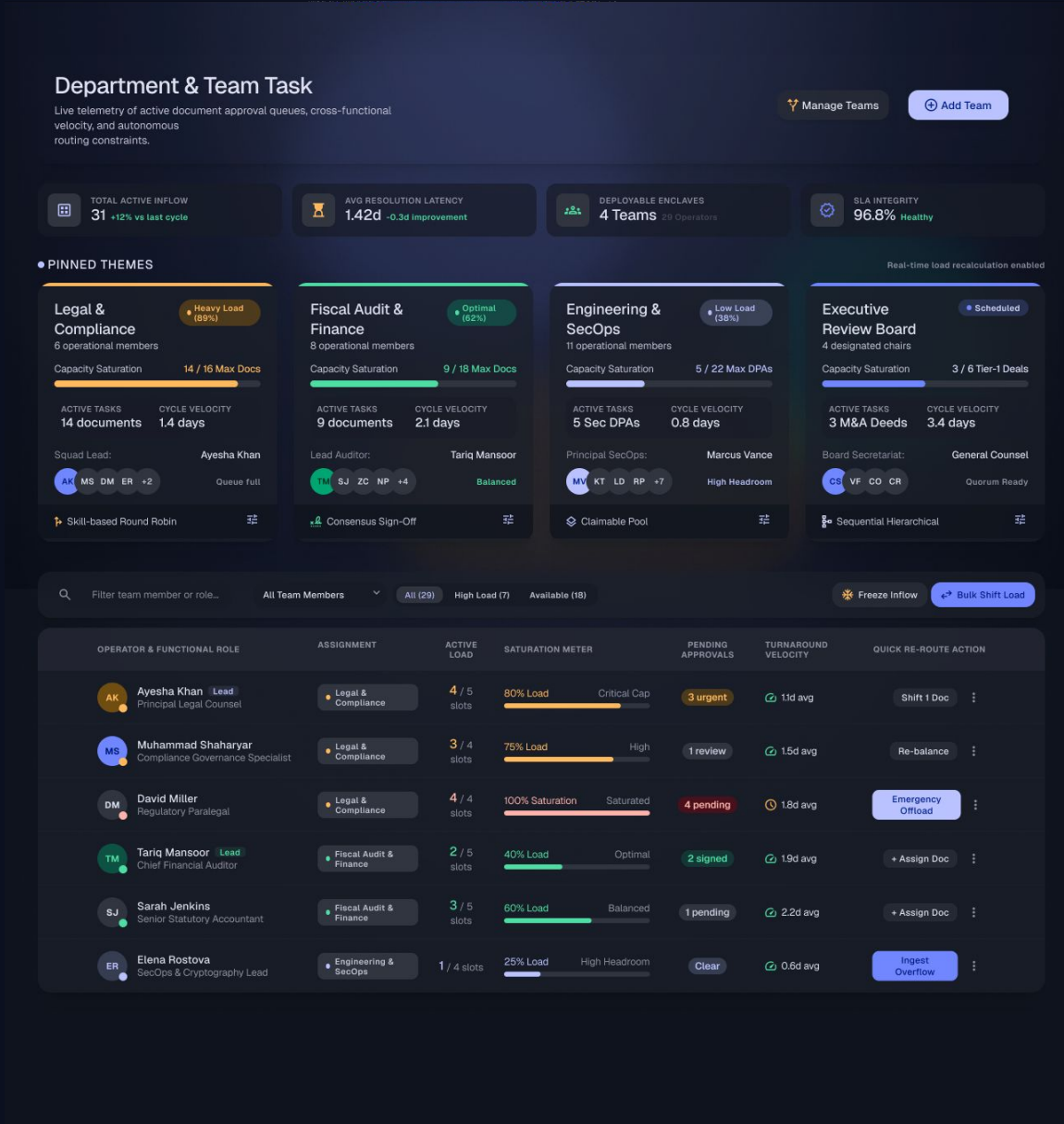
The screen brings assignment operations and departmental work into one view.

HOW THE DESIGN DOES IT

A team list, summary information and contextual detail support comparison.

WHY IT MATTERS

Managers can look for uneven workloads without relying on a personal task list.



A task management center

WHAT CHANGED

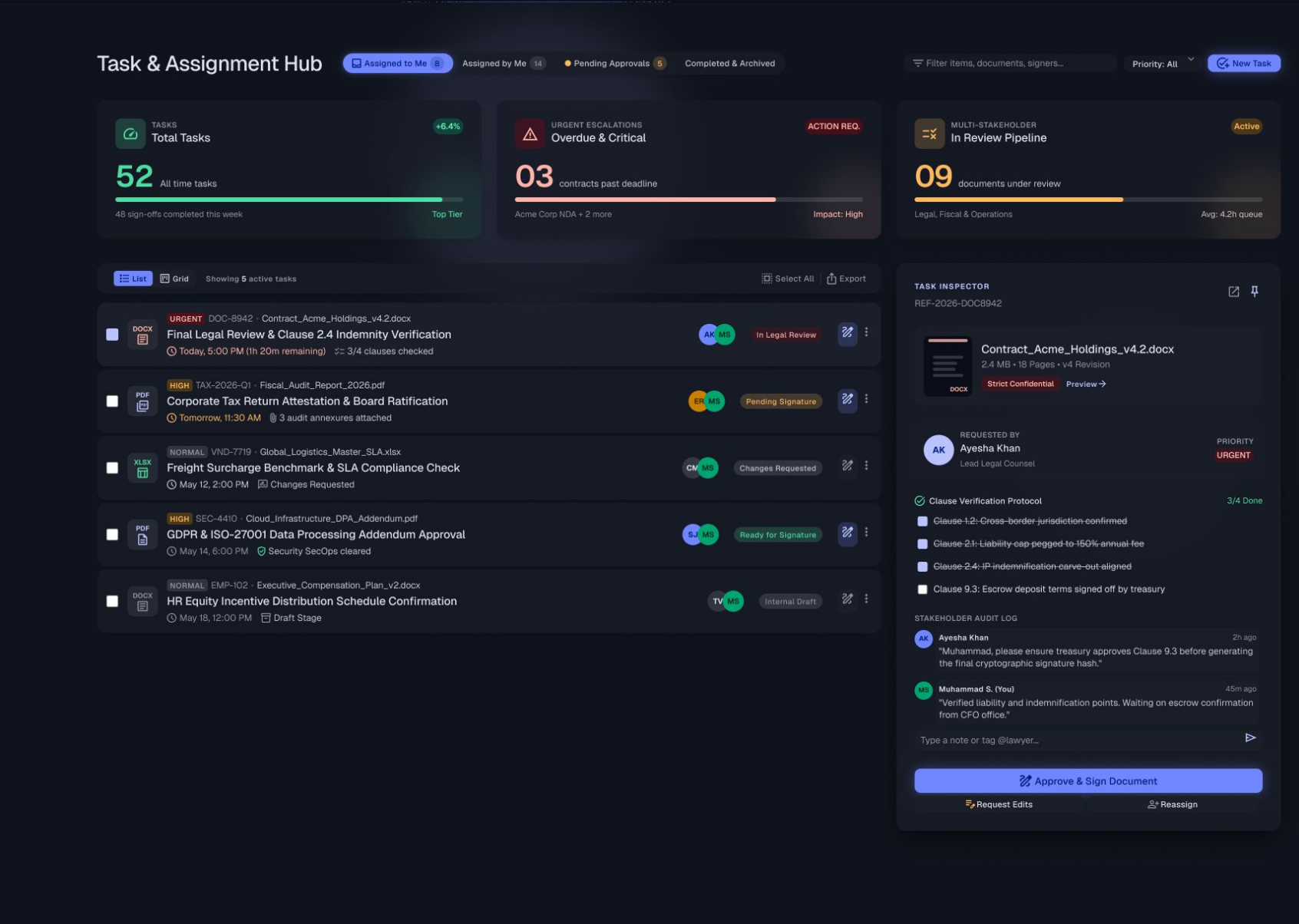
The task center pairs work summaries with assignments and supporting context.

HOW THE DESIGN DOES IT

Status summaries sit above the main task area, with details alongside it.

WHY IT MATTERS

A manager can review the current work situation before acting on a specific assignment.



Document-linked task creation

WHAT CHANGED

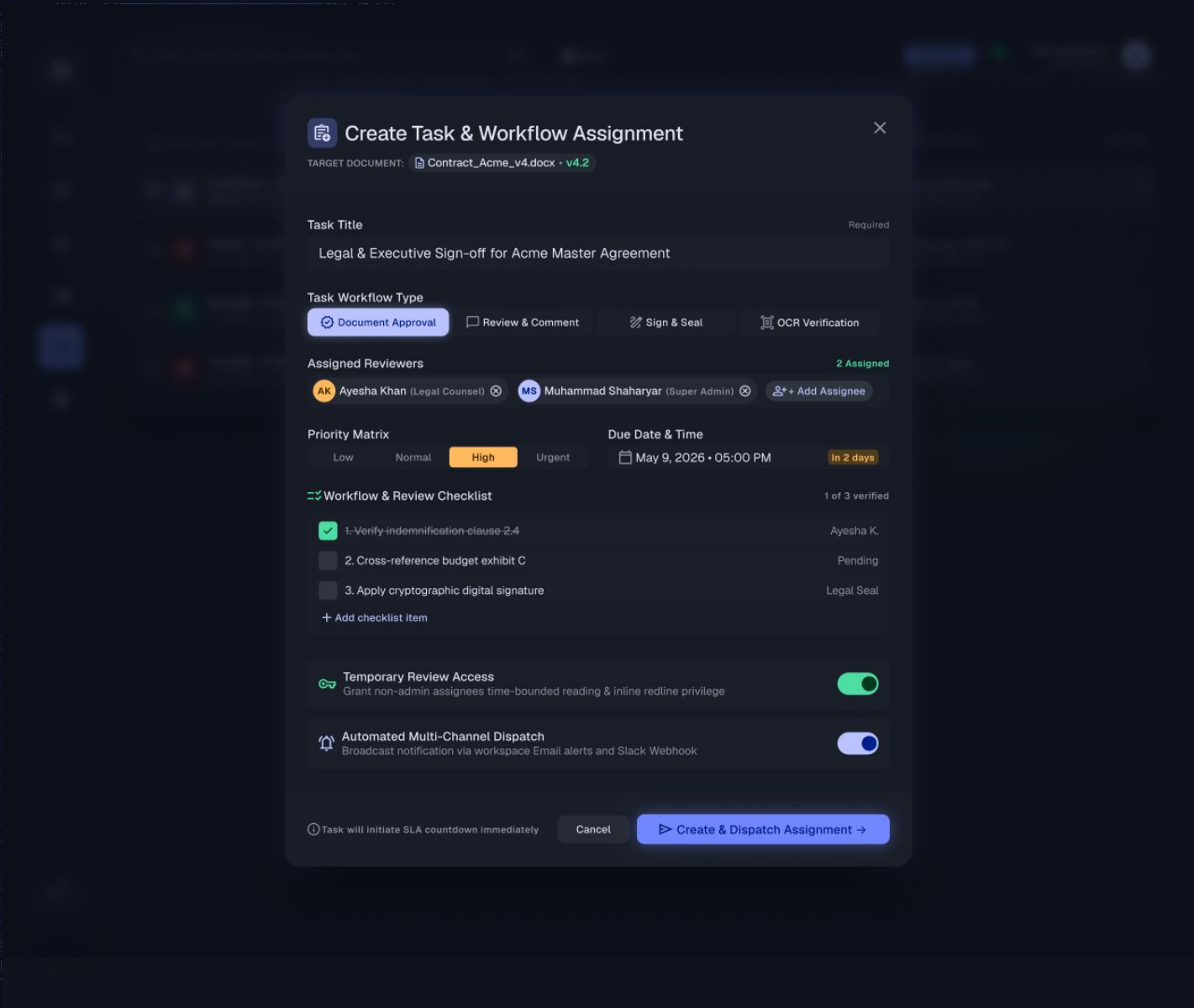
The creation modal keeps the target document visible while configuring the task.

HOW THE DESIGN DOES IT

Workflow type, reviewers, linked files, priority and checklist items share one form.

WHY IT MATTERS

The assignment can describe what to review and who should take responsibility.



Task creation with review context

WHAT CHANGED

This task modal shows a richer assignment state with a populated checklist.

HOW THE DESIGN DOES IT

Linked deliverables and temporary review access sit beside workflow and due-date choices.

WHY IT MATTERS

Reviewers receive more context at creation time. Access must still follow real policy.

Create Task & Workflow Assignment

TARGET DOCUMENT: Contract_Acme_v4.docx - v4.2

Task Title

Legal & Executive Sign-off for Acme Master Agreement

Required

Task Workflow Type

Document Approval

Review & Comment

Sign & Seal

OCR Verification

Assigned Reviewers

2 Assigned

AK

Ayesha Khan (Legal Counsel)

MS

Muhammad Shaharyar (Super Admin)

+ Add Assignee

Attached Documents & Deliverables

3 Files Linked

+ Browse Vault

Contract_Acme_Holdings_v4.2.docx

Primary Deliverable (Sign/Review)

2.4 MB • DOCX

Fiscal_Audit_Report_2026.pdf

Exhibit Ref

4.1 MB • PDF

Capex_Pricing_Matrix_Q3.xlsx

Supporting Data

1.2 MB • XLSX

+ Drag & drop additional annexures, NDA exhibits, or browse enterprise vault

(PDF, DOCX, XLSX, max 50MB)

Priority Matrix

Low

Normal

High

Urgent

Due Date & Time

May 9, 2026 • 05:00 PM

In 2 days

Workflow & Review Checklist

1 of 3 verified

1-Verify-indemnification-clause-2.4

Ayesha K.

2. Cross-reference budget exhibit C

Pending

3. Apply cryptographic digital signature

Legal Seal

+ Add checklist item

Temporary Review Access

Grant non-admin assignees time-bounded reading & inline redline privilege

Task overview across the module

WHAT CHANGED

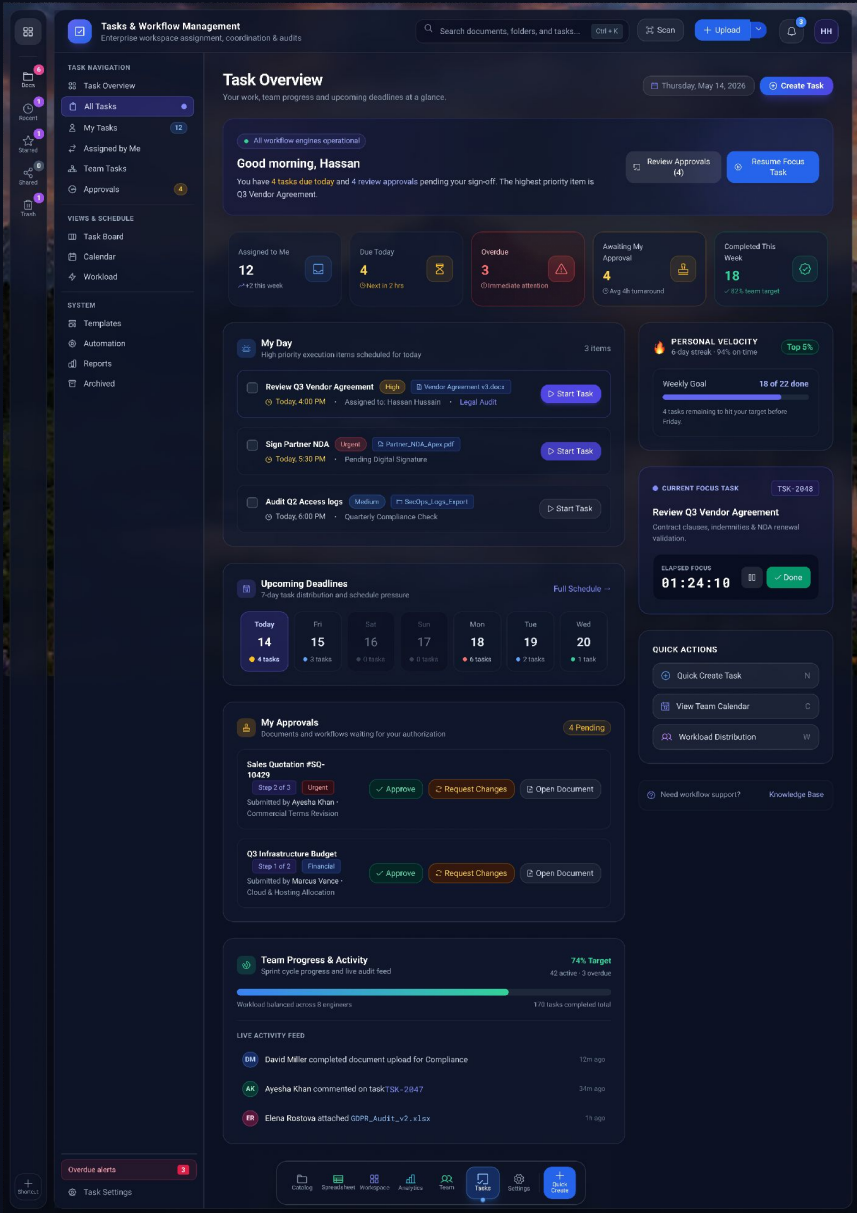
The overview combines summaries and several task-related sections in a long page.

HOW THE DESIGN DOES IT

The shared shell frames an overview that extends below the initial viewport.

WHY IT MATTERS

One page can orient users before they choose the view needed for detailed work.



All tasks in a structured list

WHAT CHANGED

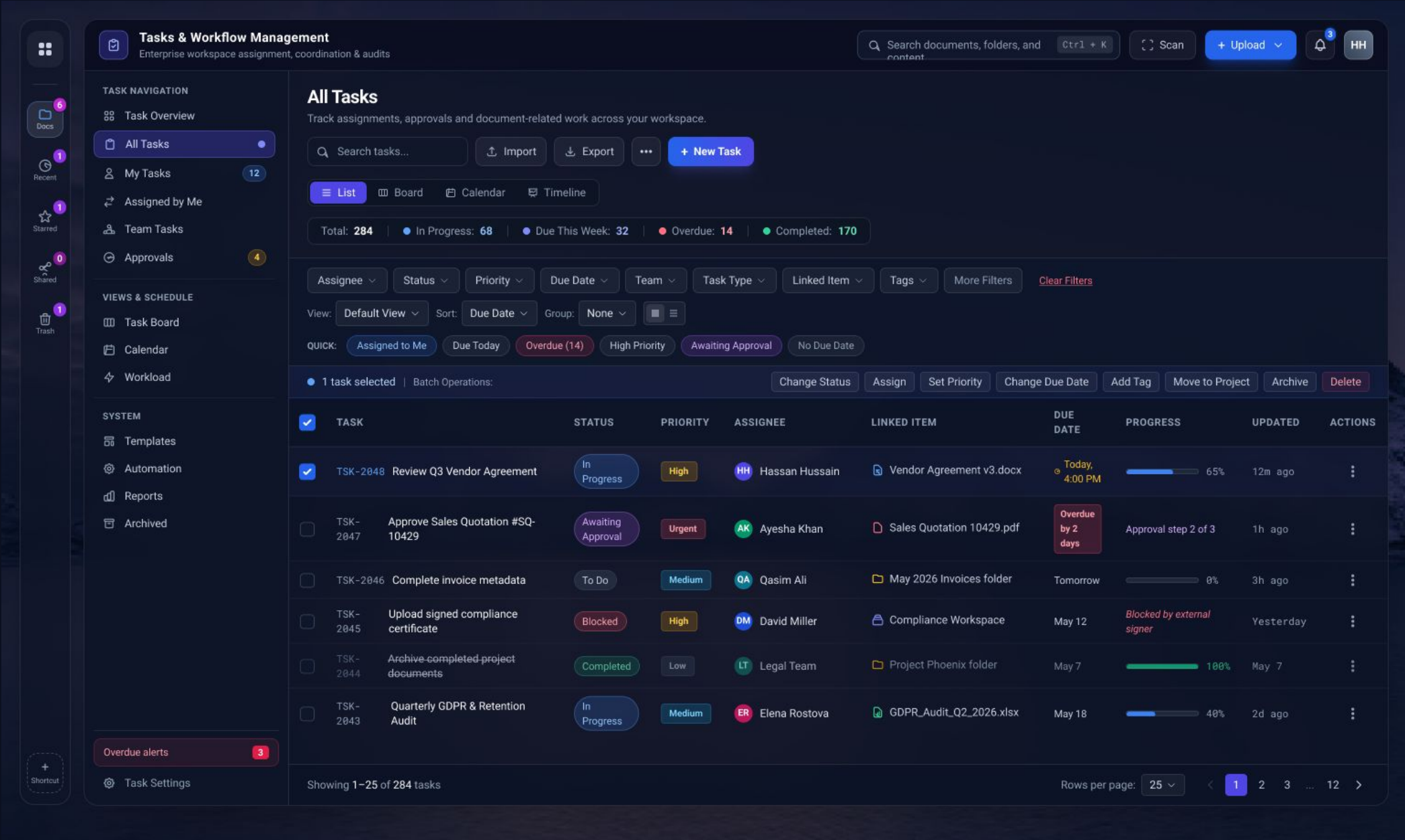
The all-tasks screen presents multiple assignments in a dense operational table.

HOW THE DESIGN DOES IT

Filters and summaries precede rows with status, responsibility and due-date context.

WHY IT MATTERS

A common list supports scanning, sorting and comparison across assignments.



An alternate all-tasks state

WHAT CHANGED

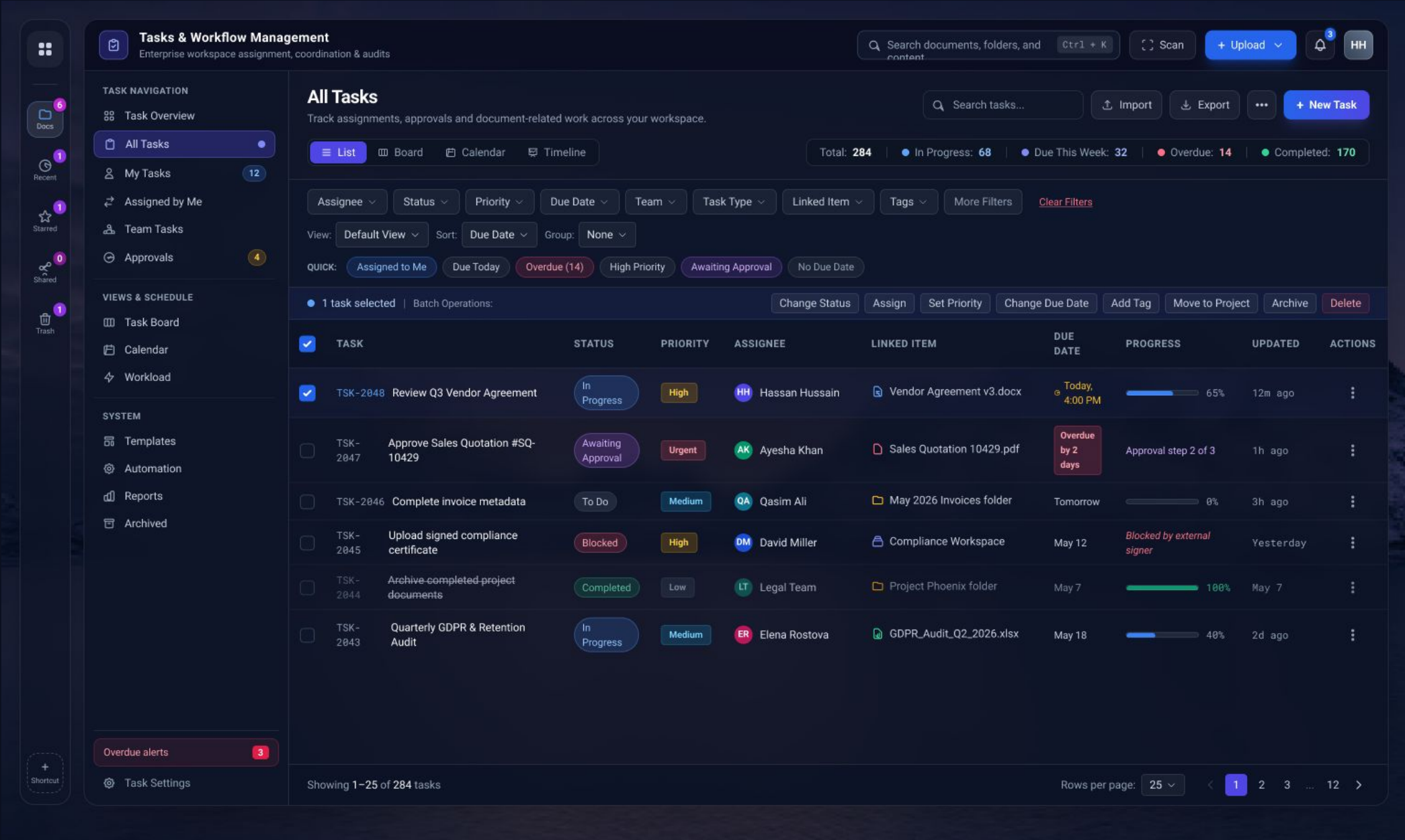
The archive includes a second rendering of the all-tasks layout.

HOW THE DESIGN DOES IT

The same navigation and table pattern carry through this alternate screen.

WHY IT MATTERS

Consistent structure can help users retain orientation as content or state changes.



Personal task priorities

WHAT CHANGED

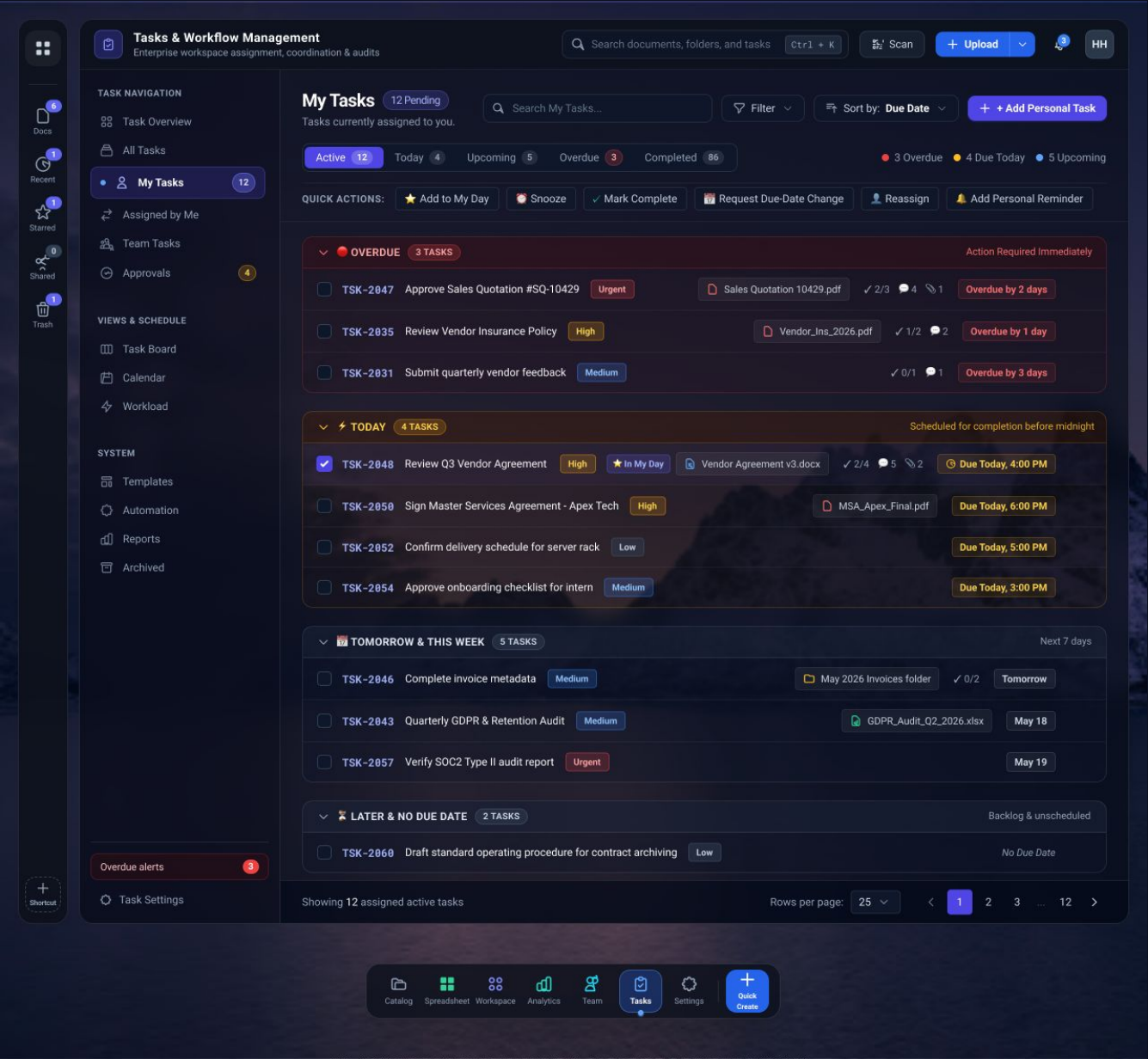
The personal view focuses on work assigned to the current user.

HOW THE DESIGN DOES IT

Status and priority cues accompany the assignment rows and contextual side area.

WHY IT MATTERS

A dedicated personal queue can make individual responsibility easier to locate.



Task details in context

WHAT CHANGED

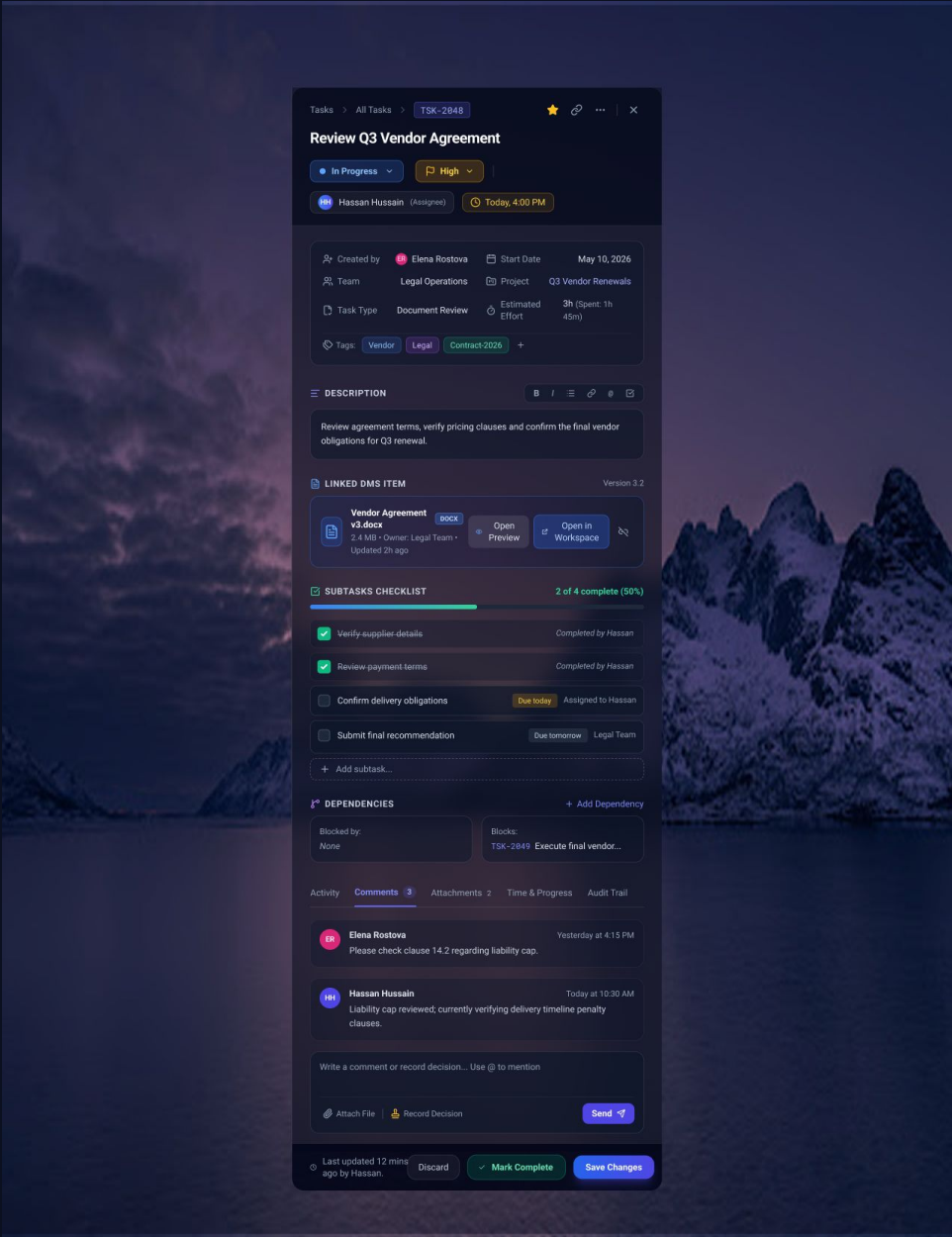
A tall detail overlay exposes more information about a selected task.

HOW THE DESIGN DOES IT

The task surface sits over the workspace, maintaining the surrounding environment.

WHY IT MATTERS

Users can inspect an assignment while retaining their place in the task list.



Follow-up for delegated work

WHAT CHANGED

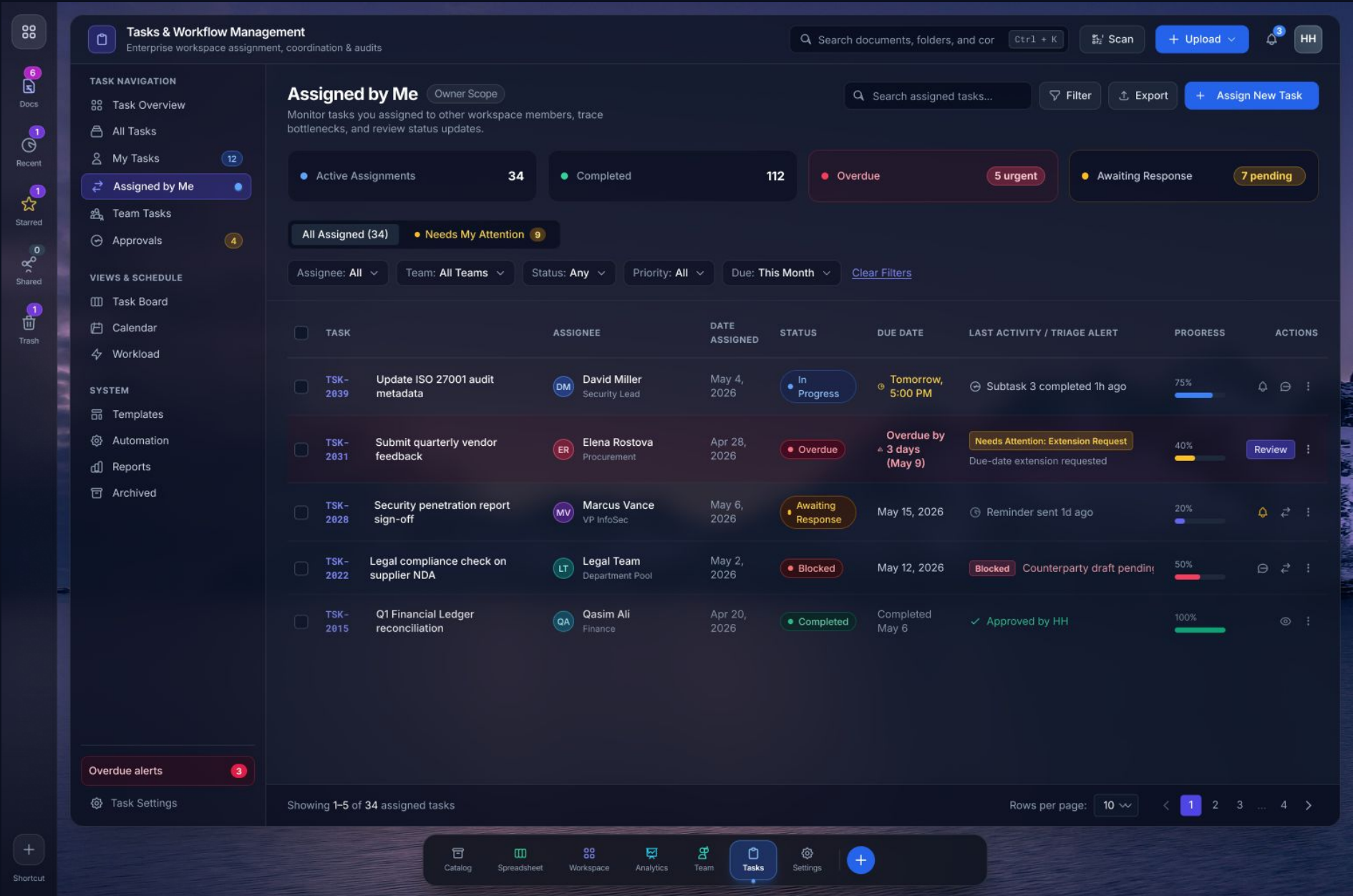
This view separates tasks the user assigns from tasks they must complete.

HOW THE DESIGN DOES IT

A familiar list layout presents ownership and progress for delegated assignments.

WHY IT MATTERS

Assignment creators can review follow-up work without mixing it into their personal queue.



Team work at a glance

WHAT CHANGED

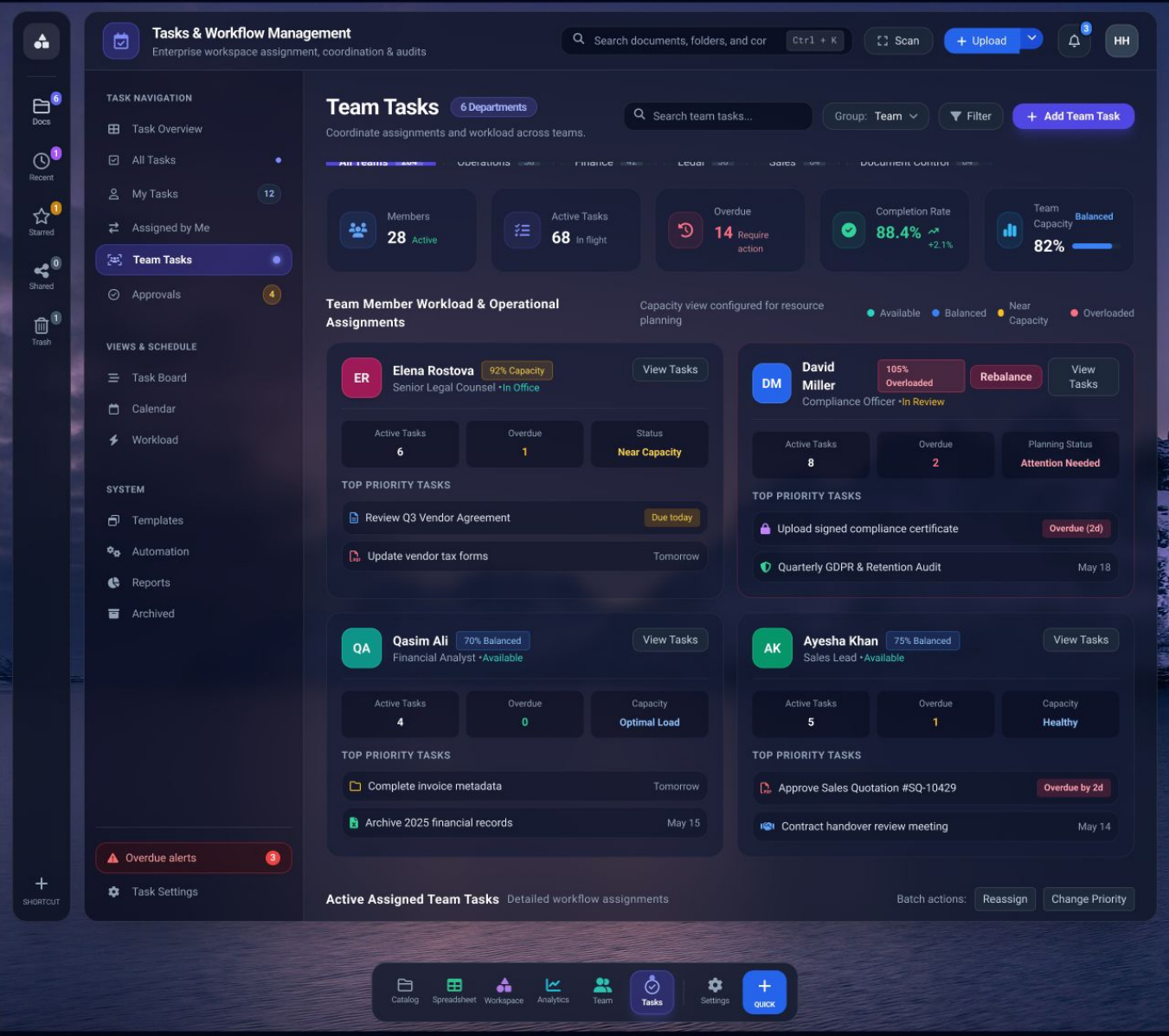
The team view organizes work into visible team-oriented groups.

HOW THE DESIGN DOES IT

Summary information, assignment cards and contextual details share the working surface.

WHY IT MATTERS

The layout supports team coordination beyond a simple member directory.



A focused approval queue

WHAT CHANGED

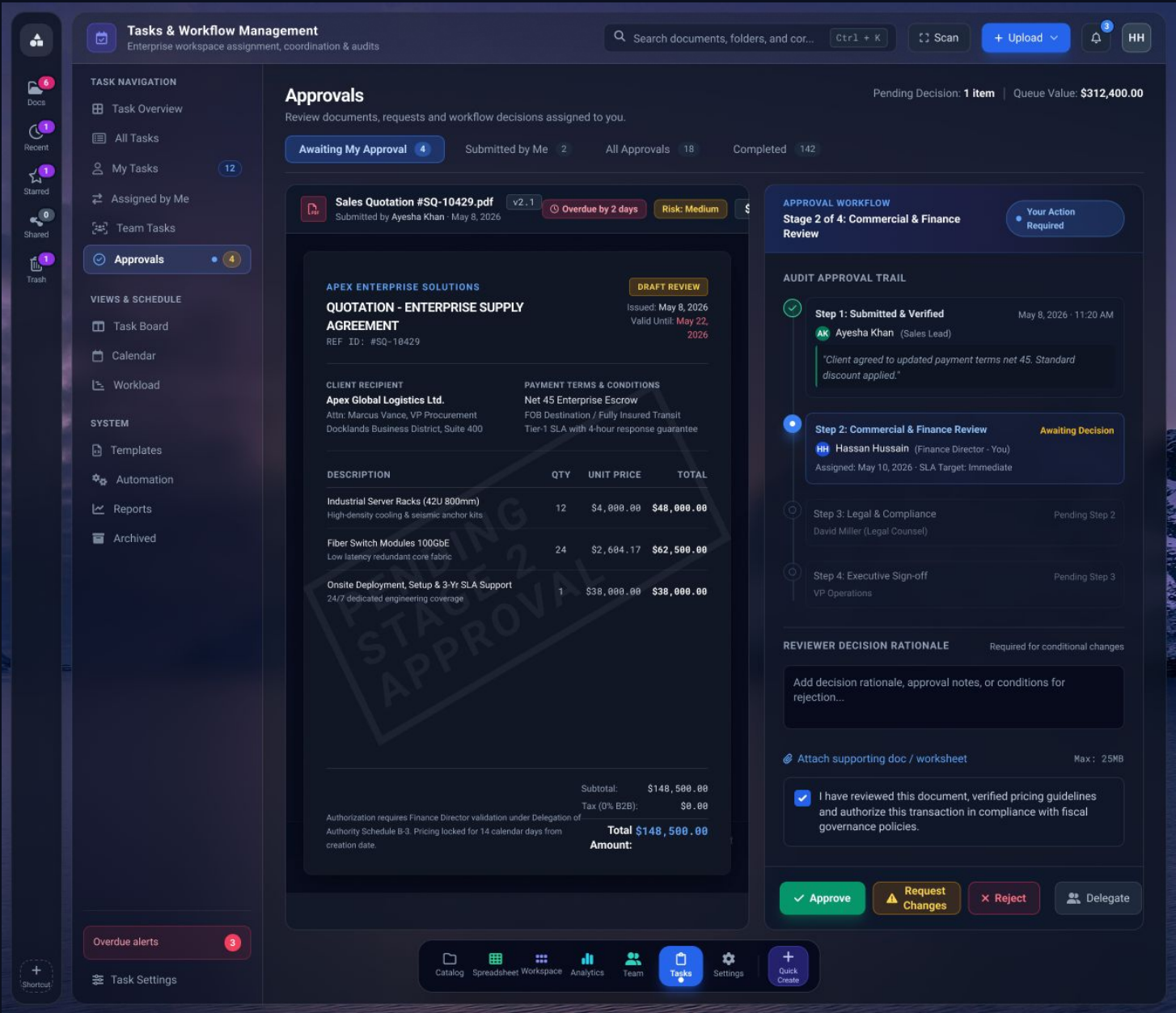
Approvals receive their own screen and decision context.

HOW THE DESIGN DOES IT

The selected request appears with its document information and nearby decision controls.

WHY IT MATTERS

Review decisions can happen with supporting context instead of from a status label alone.



Tasks grouped by stage

WHAT CHANGED

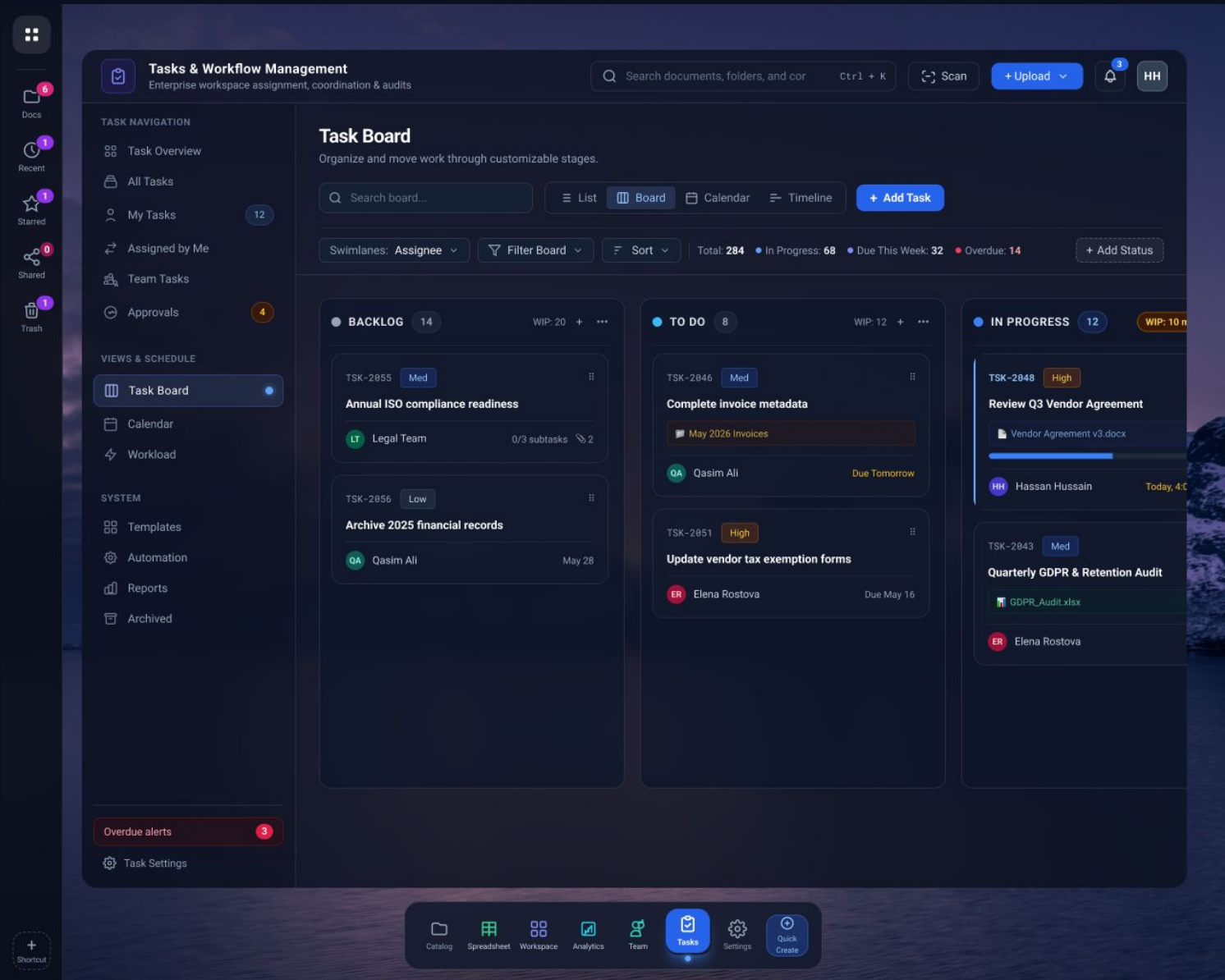
The board presents assignments in columns representing workflow stages.

HOW THE DESIGN DOES IT

Task cards retain concise status and responsibility cues inside each column.

WHY IT MATTERS

A board offers a visual view of distribution across stages. Movement behavior needs testing.



A wider board view

WHAT CHANGED

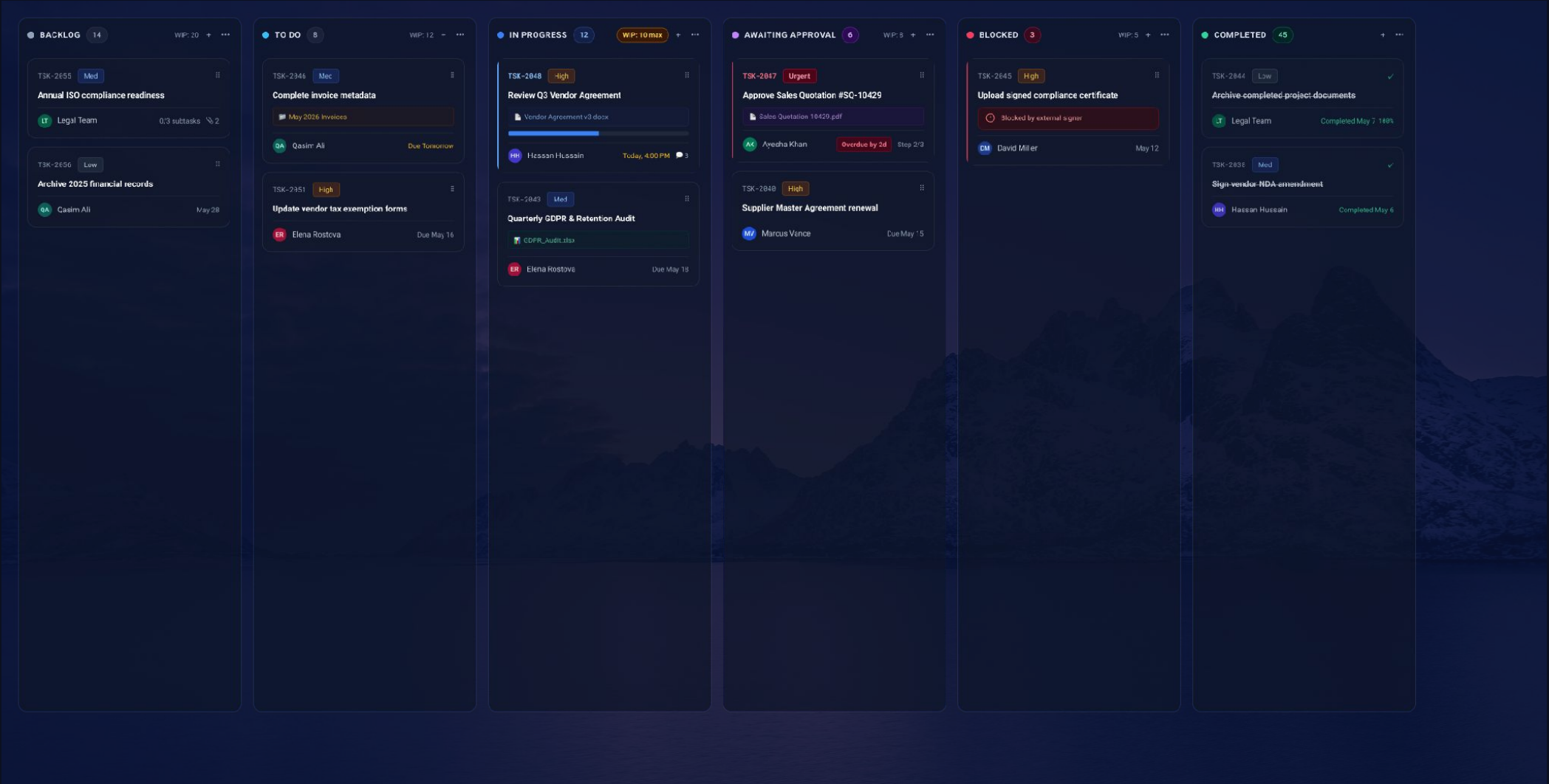
The continuation screenshot shows more columns across the task board.

HOW THE DESIGN DOES IT

The same card pattern repeats through the extended horizontal layout.

WHY IT MATTERS

The full board communicates the wider process. Narrow displays will need a navigation strategy.



General settings

WHAT CHANGED

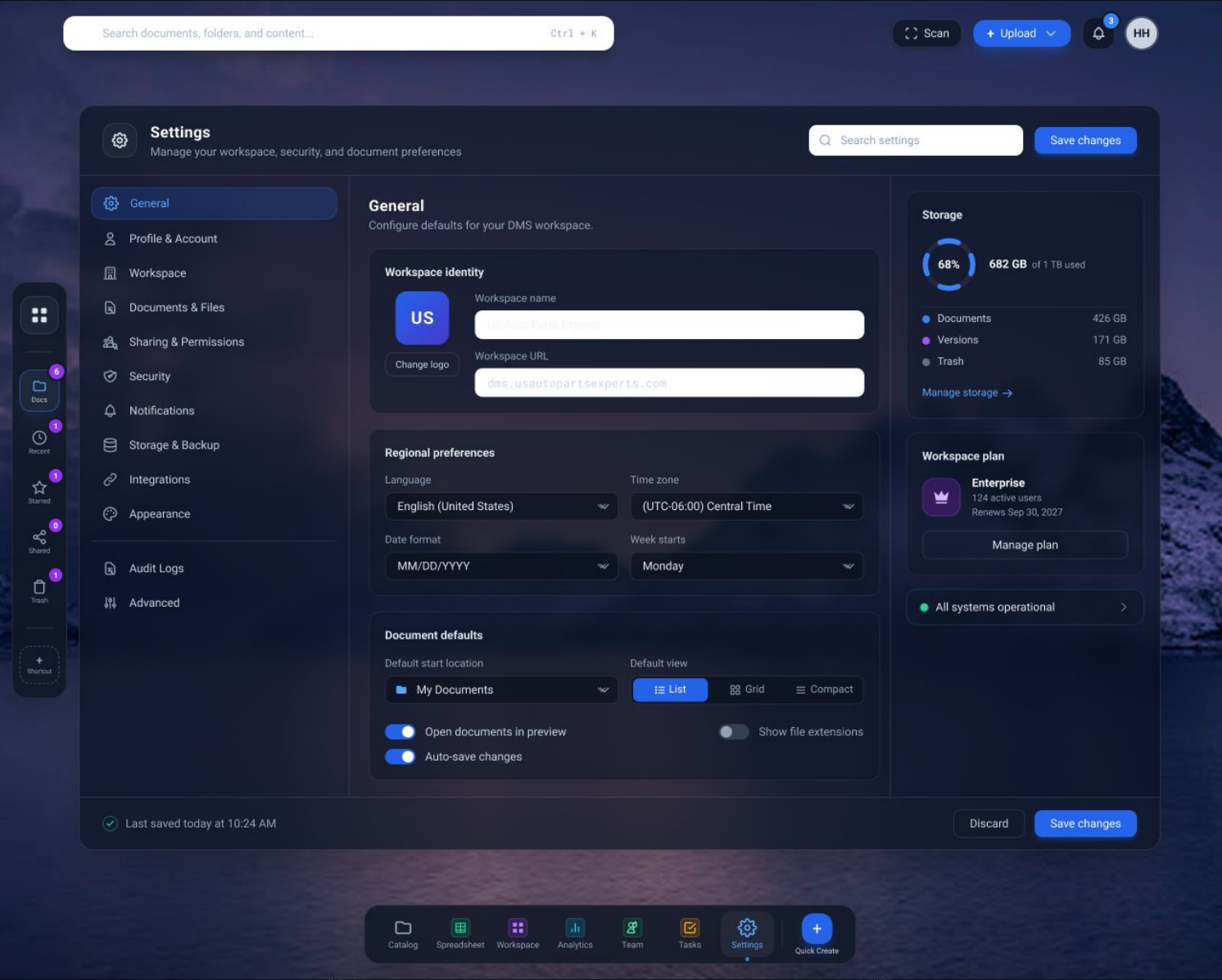
General configuration has a dedicated landing page.

HOW THE DESIGN DOES IT

Grouped controls sit within the shared settings shell.

WHY IT MATTERS

Common preferences gain a predictable home.



Profile and account

WHAT CHANGED

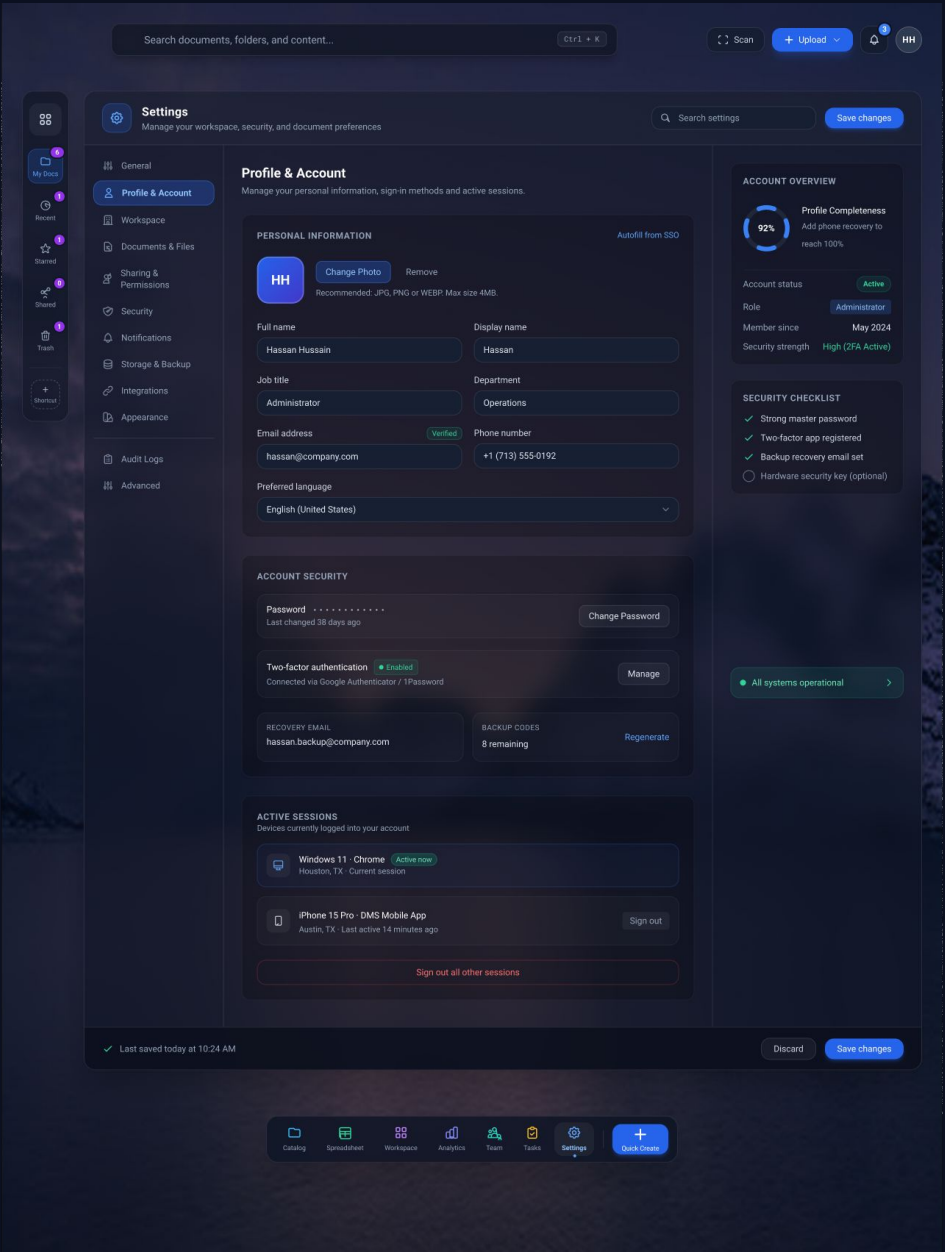
Account configuration expands beyond the small previous profile form.

HOW THE DESIGN DOES IT

Identity and account-related sections occupy a longer structured page.

WHY IT MATTERS

Users can review related account choices together.



Workspace preferences

WHAT CHANGED

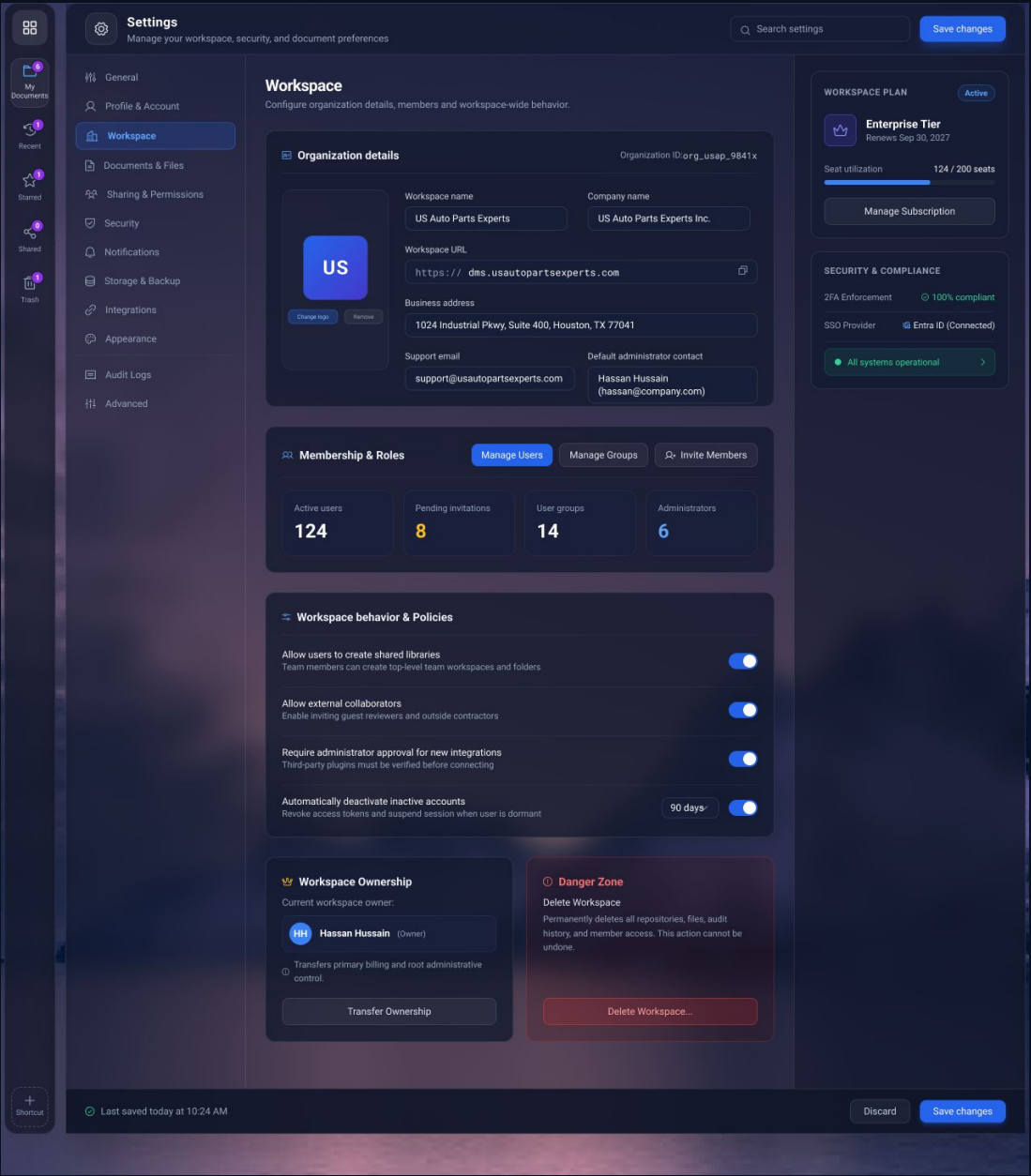
Workspace configuration becomes its own category.

HOW THE DESIGN DOES IT

Several preference groups sit under a consistent sidebar and contextual panel.

WHY IT MATTERS

Workspace behavior can remain separate from personal identity settings.



Document and file settings

WHAT CHANGED

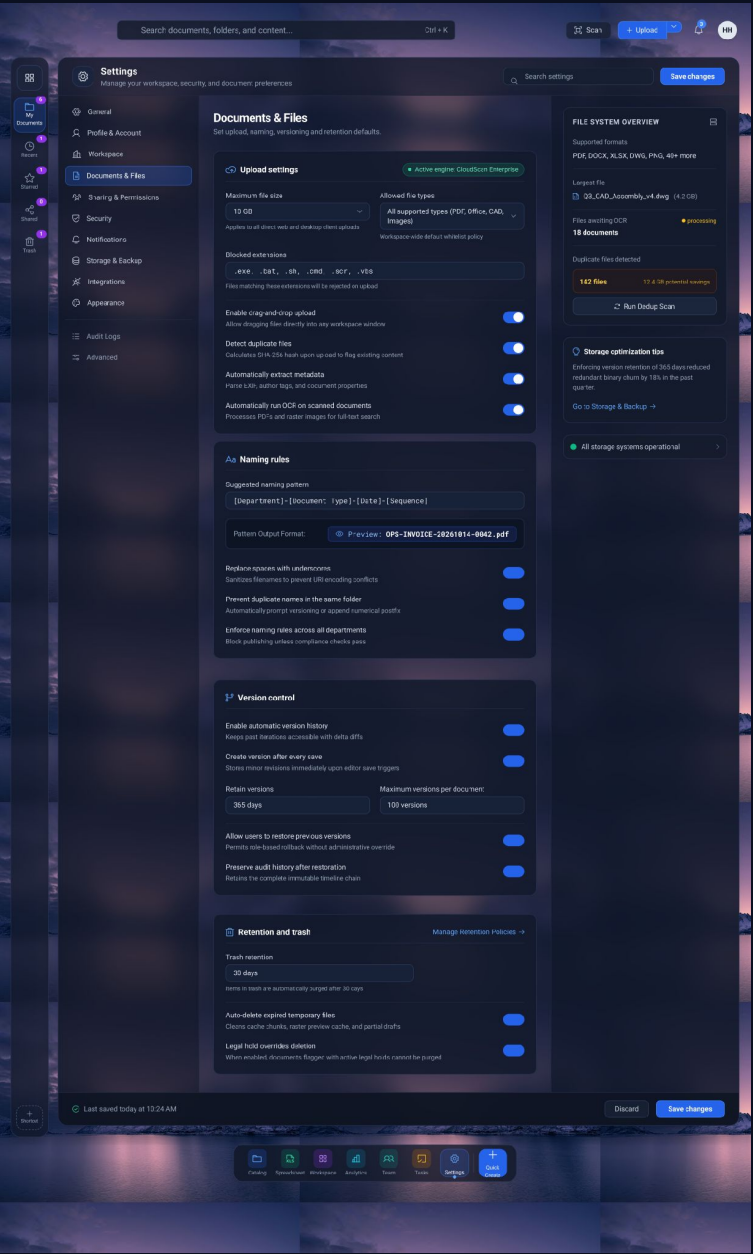
Document-related preferences span a detailed configuration page.

HOW THE DESIGN DOES IT

Section headings divide a long control surface into smaller domains.

WHY IT MATTERS

Grouping can help administrators locate file behavior without searching all settings.



Sharing and permissions

WHAT CHANGED

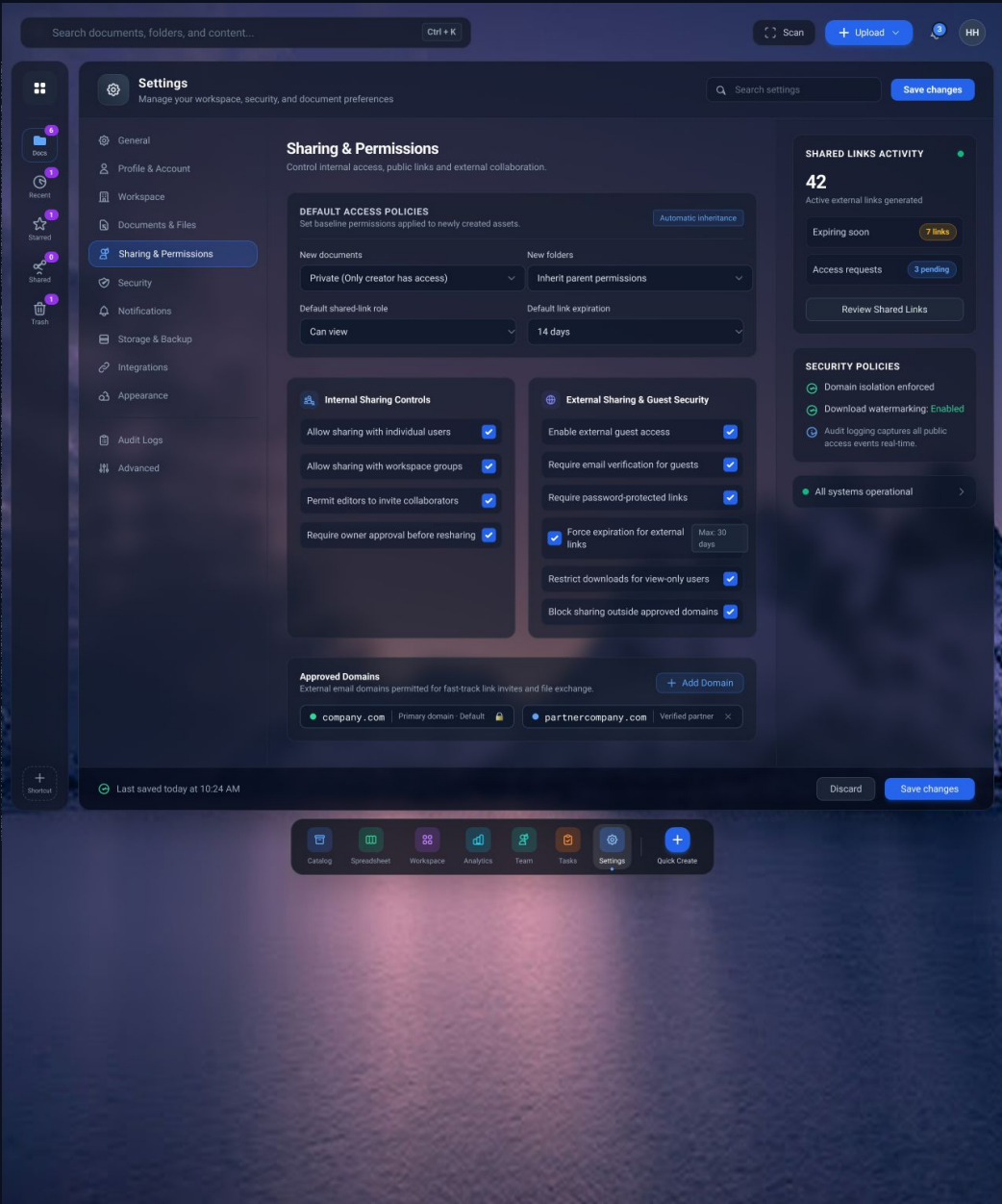
The new design gives access configuration a dedicated domain.

HOW THE DESIGN DOES IT

Permission-related controls and a matrix appear in a shared settings layout.

WHY IT MATTERS

Access choices become more discoverable. Backend enforcement still needs verification.



Security configuration

WHAT CHANGED

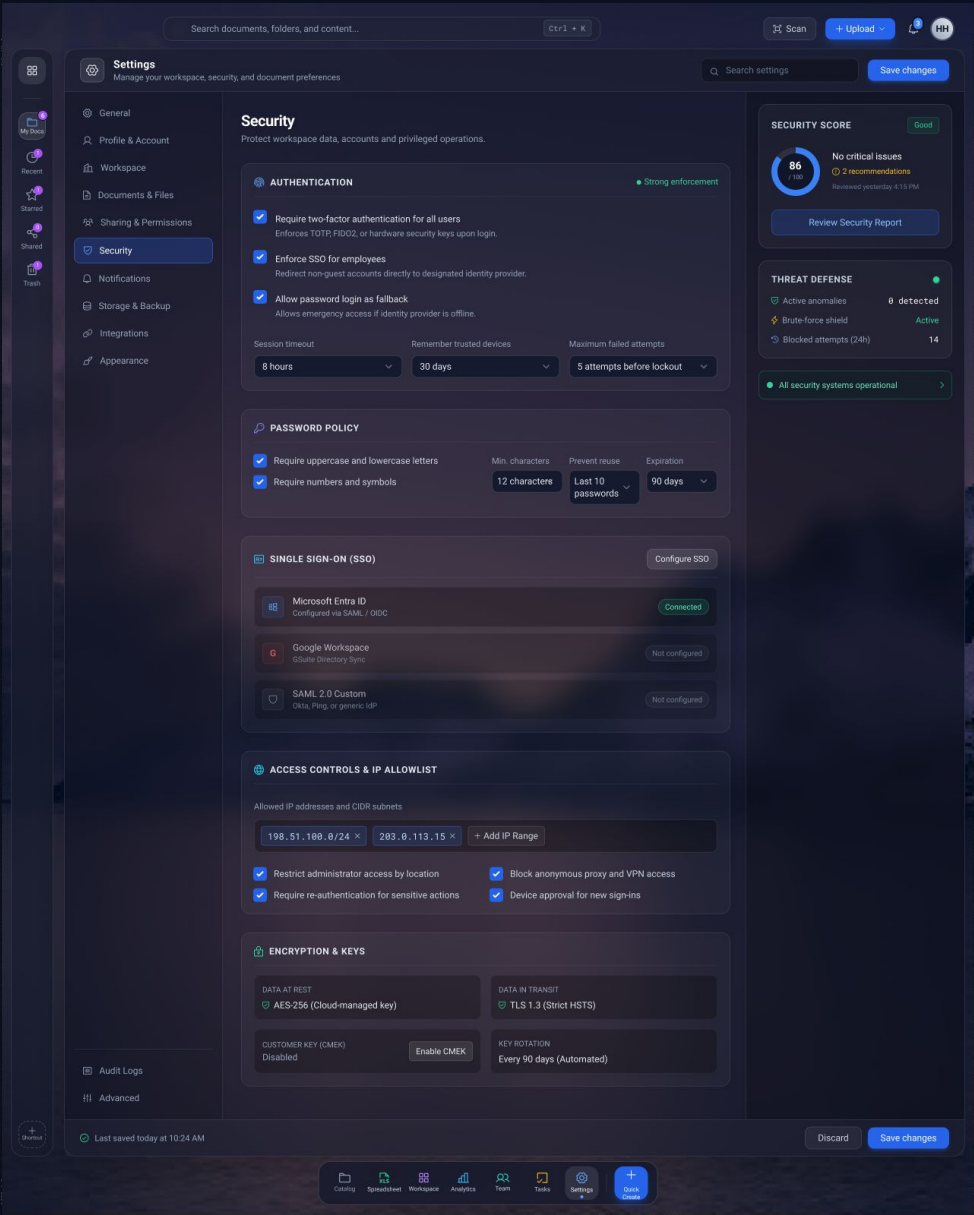
Security choices occupy a focused settings screen.

HOW THE DESIGN DOES IT

Grouped controls and explanatory content provide context around sensitive options.

WHY IT MATTERS

Sensitive actions benefit from clear explanations and confirmation behavior.



Notification preferences

WHAT CHANGED

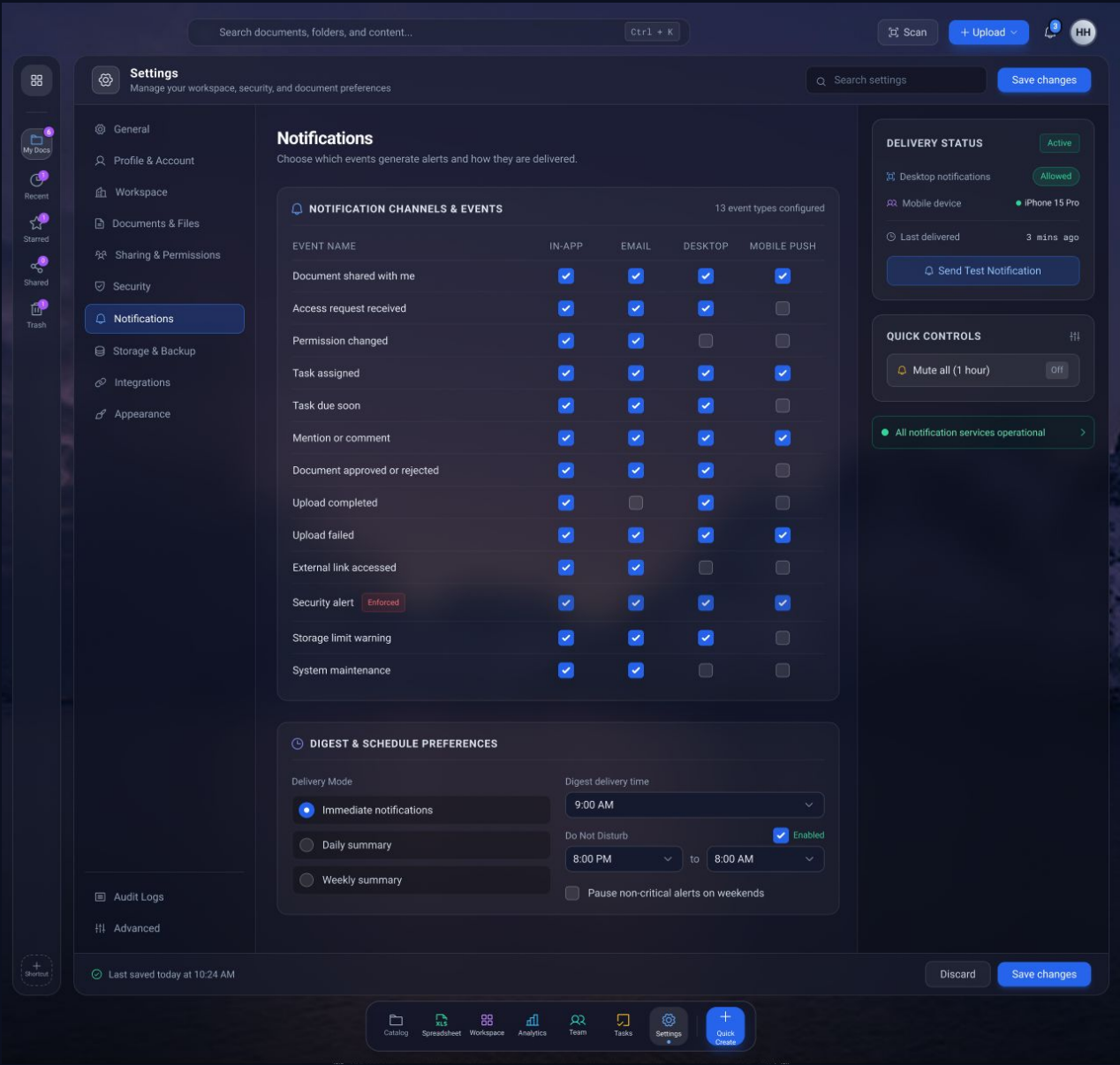
Notification configuration expands into a detailed preference surface.

HOW THE DESIGN DOES IT

A matrix-like layout organizes channels and event choices.

WHY IT MATTERS

Users can tune alerts to their responsibilities rather than receiving every update.



Storage and backup

WHAT CHANGED

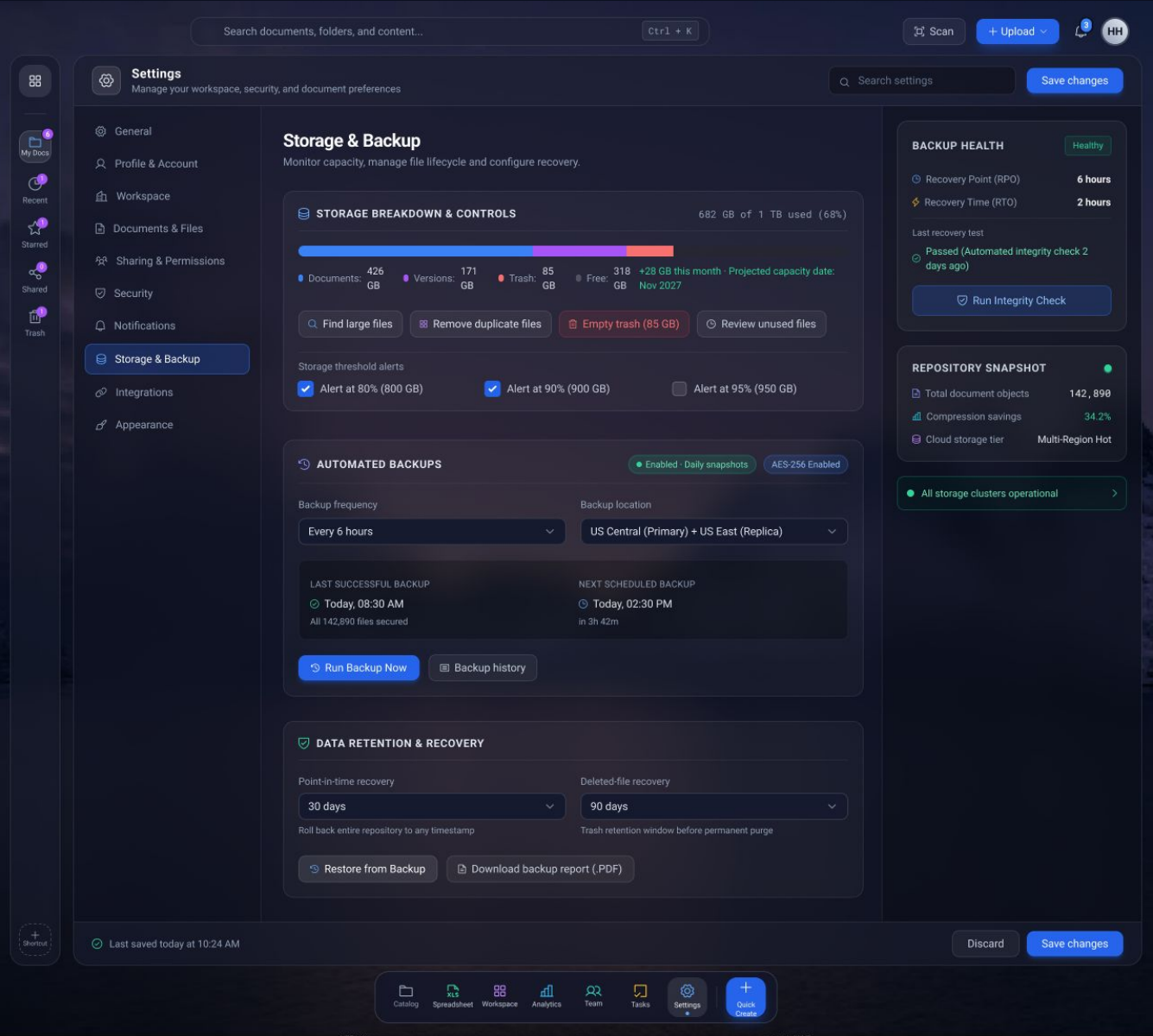
Storage status and backup-related choices share a configuration screen.

HOW THE DESIGN DOES IT

Usage indicators appear above the detailed controls and contextual information.

WHY IT MATTERS

Capacity and recovery preferences belong together when planning document storage.



Connected services

WHAT CHANGED

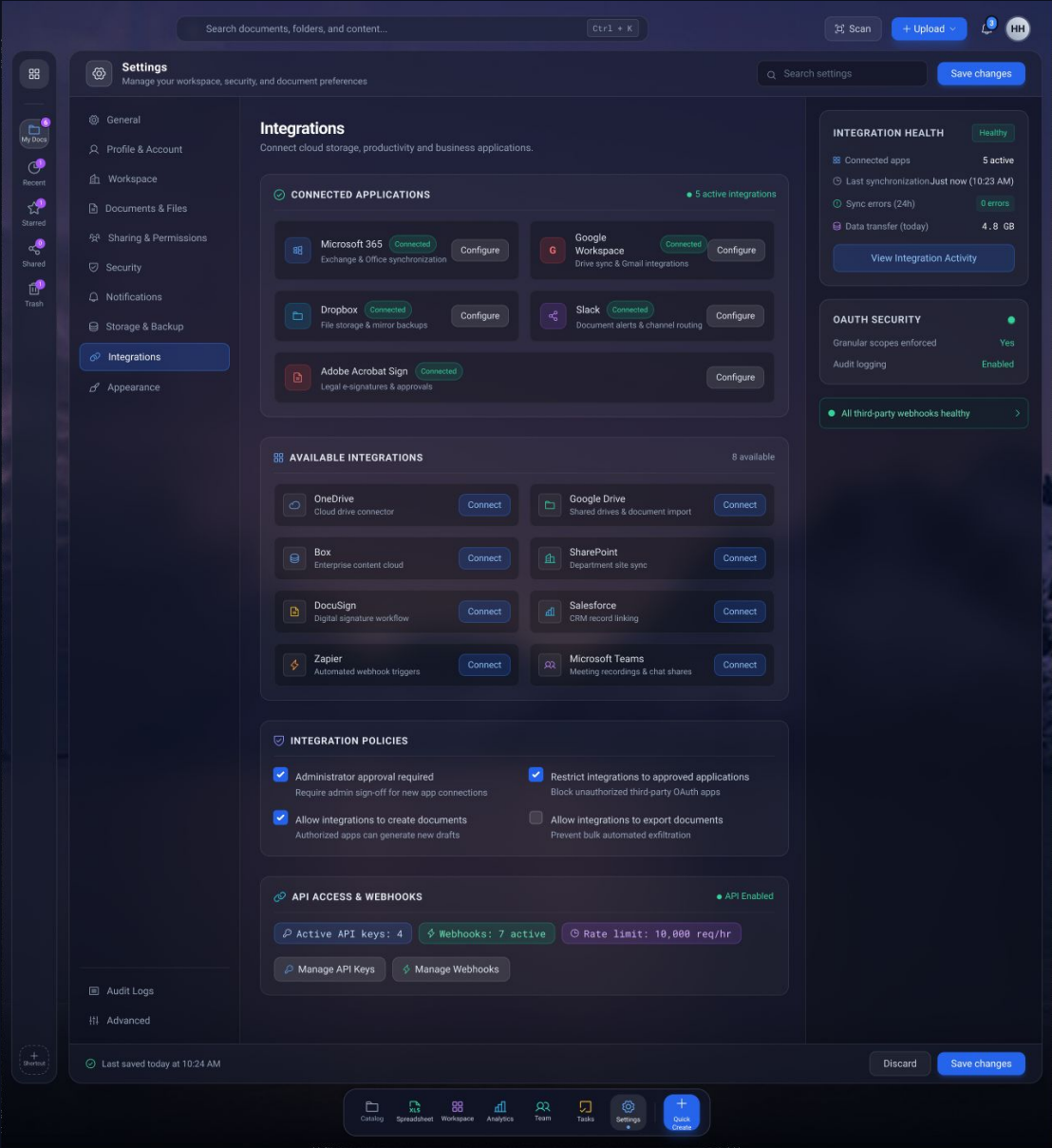
The design includes a dedicated integration management category.

HOW THE DESIGN DOES IT

Connection-related rows and configuration sections use the common settings shell.

WHY IT MATTERS

A shared management surface can make external service setup easier to inspect.



Appearance controls

WHAT CHANGED

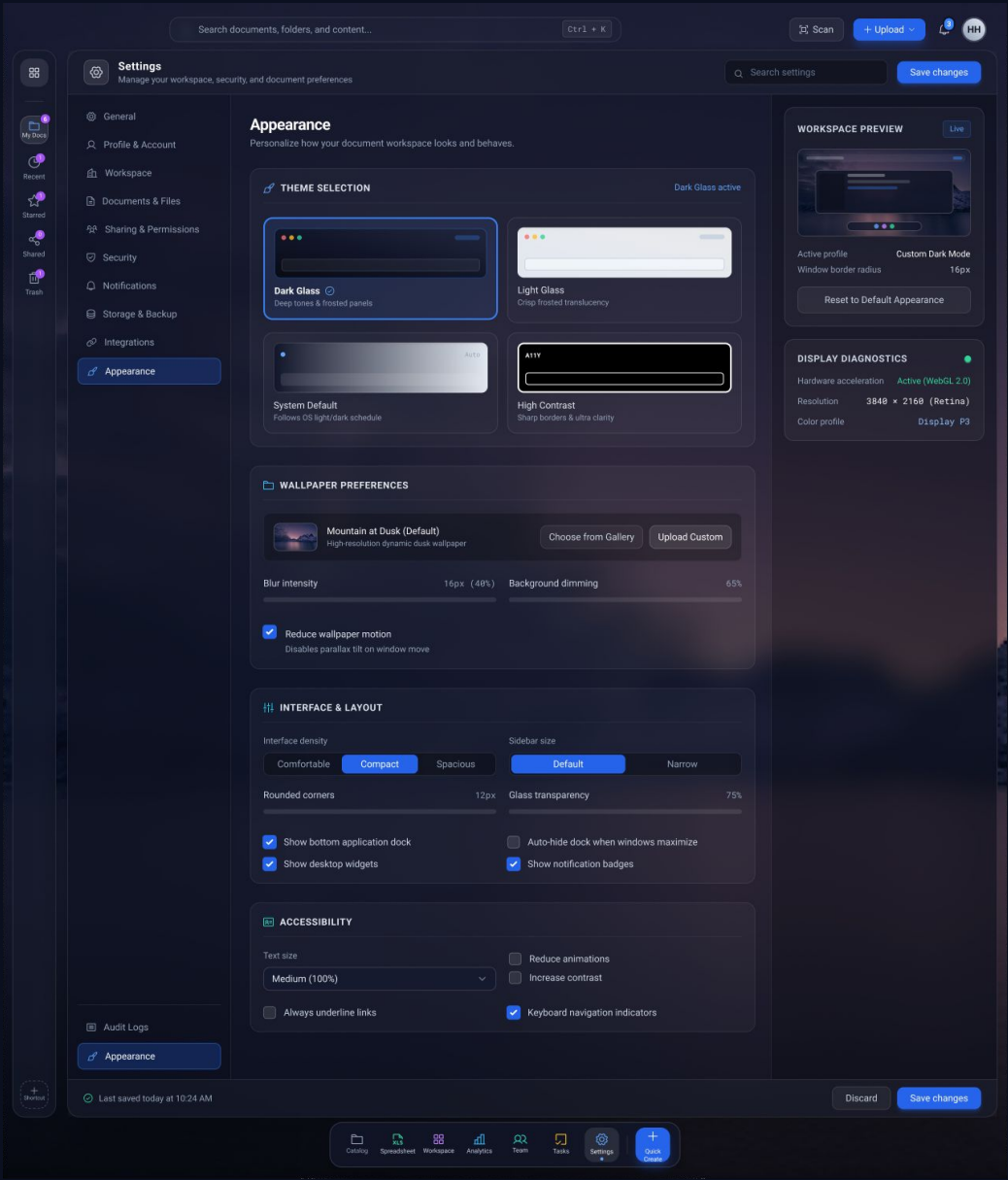
Appearance settings make the new theme an explicit configuration area.

HOW THE DESIGN DOES IT

Preview surfaces and visual preferences accompany the theme choices.

WHY IT MATTERS

User preferences can accommodate different display needs and working environments.



Audit visibility

WHAT CHANGED

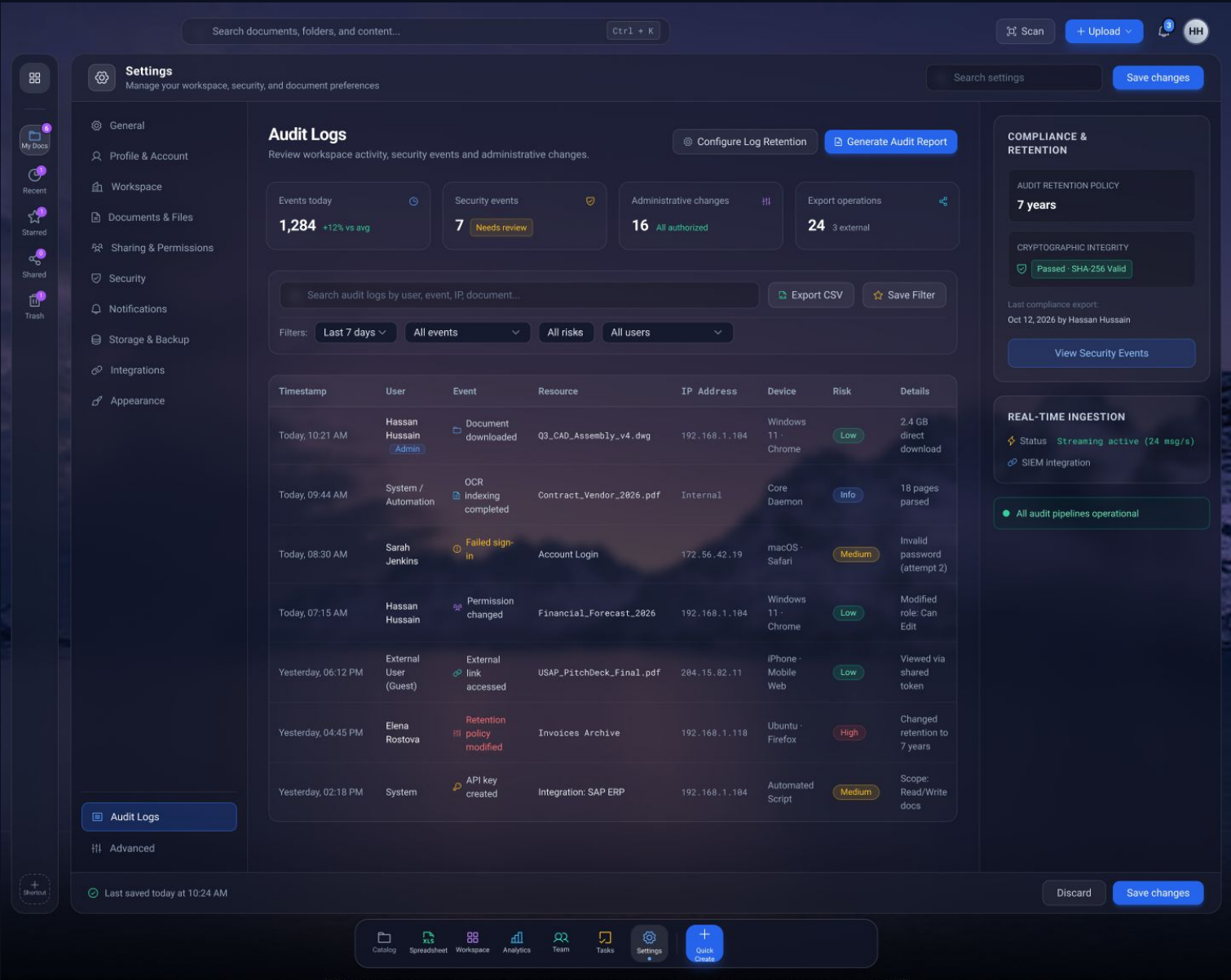
Audit activity receives a dedicated searchable-looking table surface.

HOW THE DESIGN DOES IT

Summary information and event rows appear within the same navigation system.

WHY IT MATTERS

Administrators can inspect activity in one place. Completeness and retention require backend evidence.



Advanced configuration

WHAT CHANGED

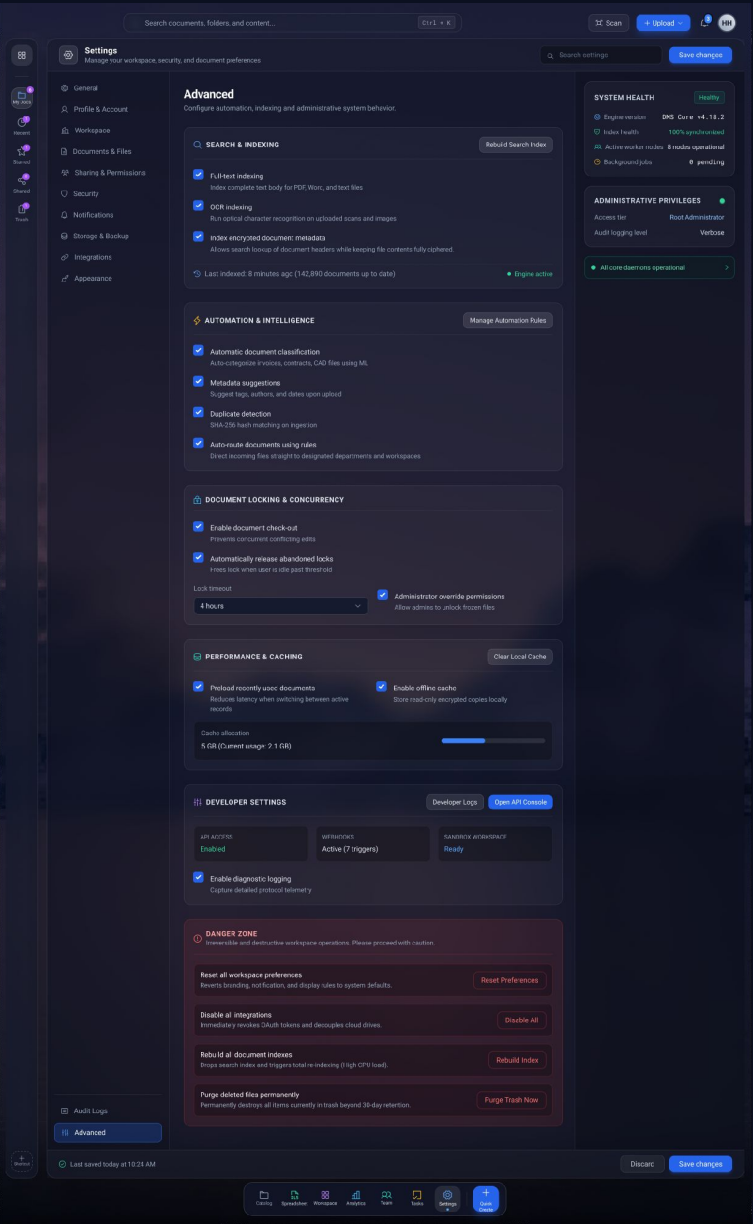
Advanced settings form a separate long page with sensitive areas visually distinguished.

HOW THE DESIGN DOES IT

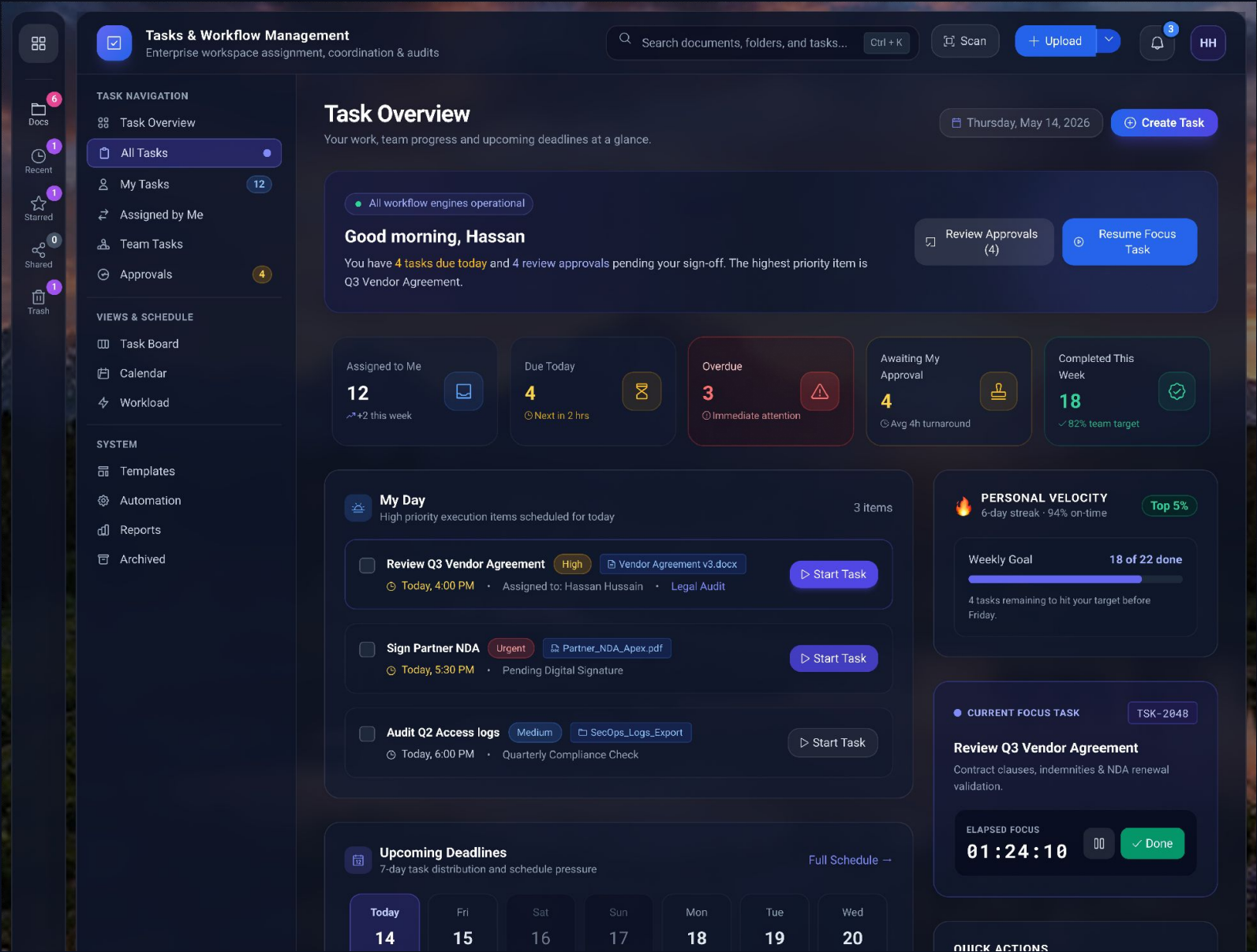
Grouped controls keep specialized options away from everyday preferences.

WHY IT MATTERS

Clear separation can limit accidental changes, provided permissions and confirmations enforce it.

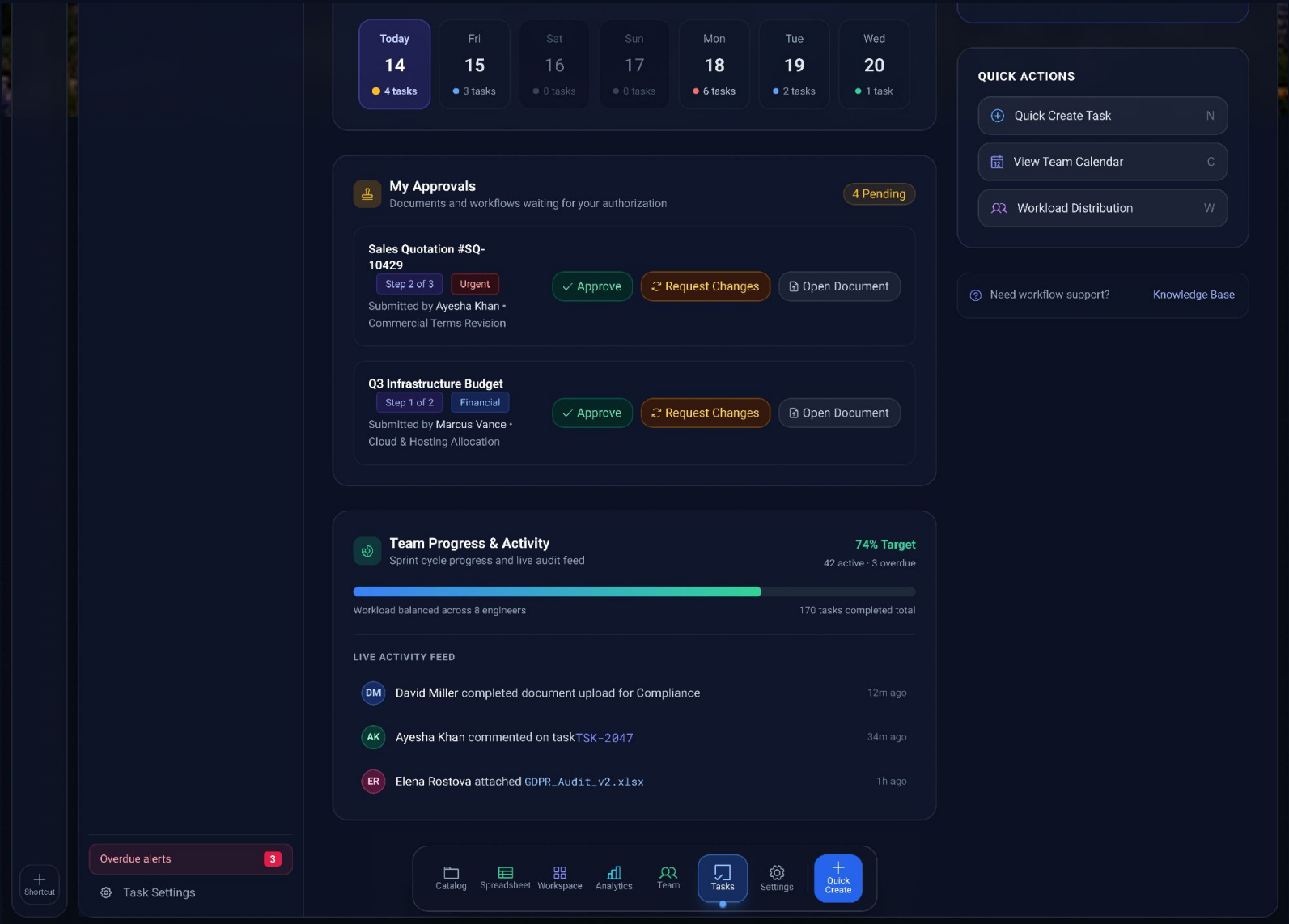


Task overview: upper sections



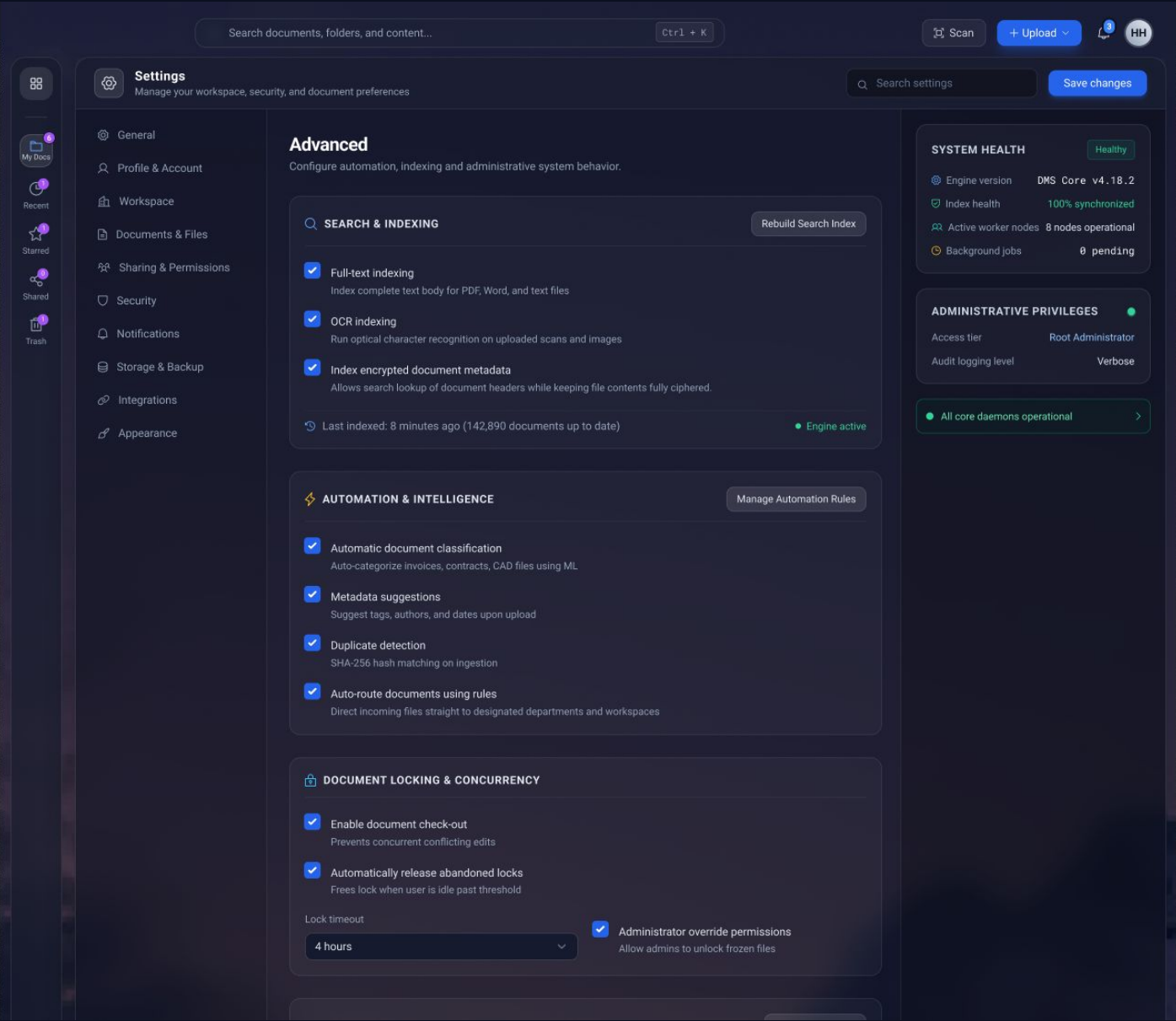
Enlarged detail from the supplied screenshot. The full page appears earlier in this deck.

Task overview: lower sections



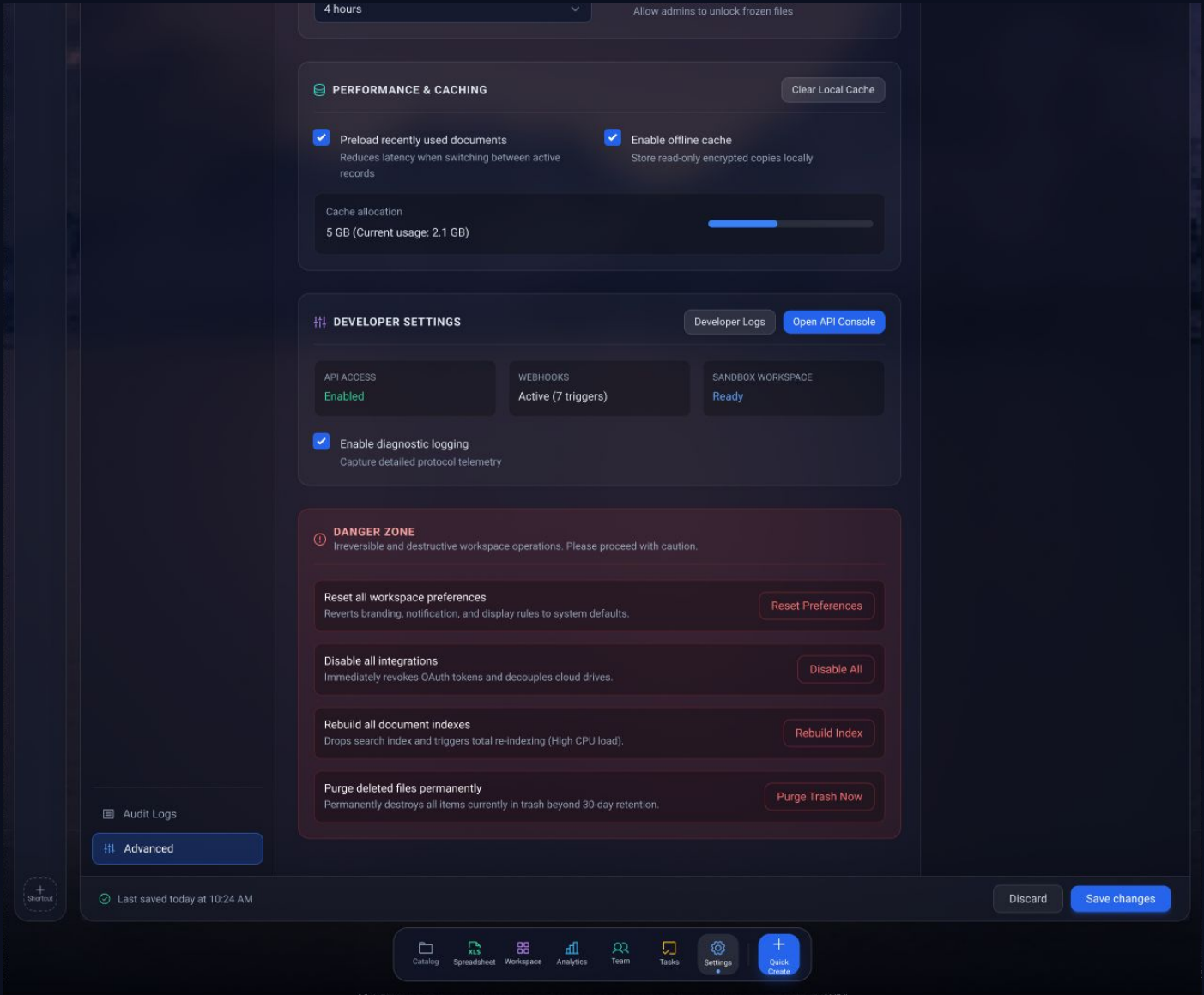
Enlarged detail from the supplied screenshot. The full page appears earlier in this deck.

Advanced settings: upper sections



Enlarged detail from the supplied screenshot. The full page appears earlier in this deck.

Advanced settings: lower sections



Enlarged detail from the supplied screenshot. The full page appears earlier in this deck.

The design method visible in the work

Retain the core jobs shown in the earlier UI: finding files, sharing documents, assigning work and managing access.

Introduce a shared workspace shell, then apply recurring patterns across the new modules.

Expand workflows with visible context, dedicated task views and domain-specific settings.

This describes the progression evidenced by the screens, rather than an unverified chronological process.

Benefits to validate

Document work: can people find a file and open a comparison session with fewer wrong turns?

Task work: can people identify their next action and understand the assigned deliverable?

Administration: can people find a setting and predict its effect before saving?

Compare task completion, errors and user confidence against the previous UI.

Tradeoffs in the new direction

Dense screens expose more context, but they can increase the amount users must scan.

Dark translucent surfaces support the visual direction, but contrast needs checking over every background.

Long forms support detailed setup, but they need section navigation and clear save behavior.

Technical labels in the mockups may need simpler language for everyday users.

Interaction and accessibility review

Verify keyboard navigation, visible focus, modal dismissal and focus return.

Check readable text, contrast, status labels and zoom behavior.

Define loading, empty, error and success states for lists, forms and approvals.

Test long pages, wide boards and inspectors at smaller viewport sizes.

Implementation priorities

Agree on the shared shell and reusable navigation patterns first.

Implement document retrieval and workspace setup before expanding secondary tools.

Connect task views to one consistent assignment model and permission model.

Validate settings and audit behavior against actual backend capabilities.

The contribution shown by this redesign

A coherent desktop visual direction across the supplied new screens.

More explicit document workflows and task coordination surfaces.

A broader administrative structure with dedicated configuration domains.

A detailed design foundation for prototyping, usability testing and implementation.