

Managing Documents and Emails with SharePoint

Interested in using Microsoft SharePoint® to replace your existing File Shares and Outlook folders? Are your users frustrated by the out-of-the-box experience of document management in SharePoint? MacroView DMF® enhances and extends the native document management capabilities of SharePoint, enabling document and email management solutions that are popular with users and IT.

Make Microsoft Outlook Your (SharePoint) DM Desktop

MacroView DMF and MacroView Message both provide excellent integration of Outlook with SharePoint. They have the best-available support for filing emails in SharePoint and also saving, searching for and retrieving documents. You can perform most document management tasks while working in Outlook.

MacroView Message is the subset of MacroView DMF that runs in Outlook.

Email Filing

- Drag and drop to save one or multiple emails, with automatic capture of email attributes and automatic naming to prevent duplicates.
- Emails saved in the background while you continue to work in Outlook.
- **Predictive Email Filing** (optional module).

Attachment Handling

- Drag and drop to save attachments. Profiling (metadata capture) as attachments are saved.
- Automatic removal of illegal characters and create new version of an existing document.
- Browse, search or right-click on a document to send it as a link or attachment.

The screenshot shows the 'SharePoint Items - Microsoft Outlook' window. The interface includes a ribbon with 'File', 'Home', 'Send / Receive', 'Folder', 'View', 'MacroView', and 'Add-Ins'. Below the ribbon is a 'Drag Your Favorite Folders' pane on the left and a 'MacroView' pane on the right. The main area displays a table of SharePoint items with columns for Type, Name, Document ID, Version, and Modified. A preview of a document titled 'Optimal Designs for Managing Documents in SharePoint' is shown at the bottom. Several callout boxes with red borders and lines pointing to specific features are present:

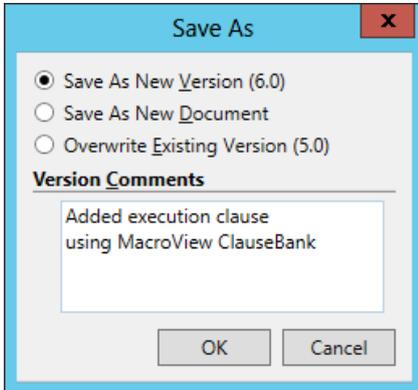
- Intuitive access to SharePoint directly from Outlook 2013, 2010 and 2007.** (Points to the top-left area of the window)
- Windows-style file list with rich right-click menu.** (Points to the table of items)
- Displays Views as defined in SharePoint and supports filtering and sorting.** (Points to the 'Current View' dropdown)
- Accurate tree-view display of all areas for which you have permission – right down to metadata navigation. The tree can contain multiple SharePoint servers and / or Office 365 tenancies.** (Points to the right-hand pane)
- Formatted previews of documents and emails stored in on-premises SharePoint.** (Points to the document preview)
- Recent and Favorites enable quick access to frequently or recently used documents, areas and searches.** (Points to the 'Favourites' and 'Recent' sections in the right pane)
- Search for documents in SharePoint using metadata and / or content while you work in Outlook or Office.** (Points to the search bar at the bottom)
- Browse mode enables efficient navigation of very large document stores.** (Points to the 'Browse' section in the right pane)

“While there are plenty of challenges associated with using SharePoint for serious-scale document management, our experience is that with the right add-on software like MacroView DMF you certainly can achieve a very satisfactory result.” **Himanshu Pandya, Senior Manager, Office of the CIO, AEGIS Insurance**

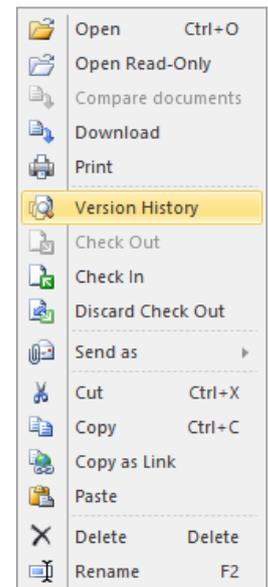
Data Sheet

Versioning, Check Out / Check In

MacroView significantly enhances the user experience and extends the capability of SharePoint in relation to check out, check in and versioning.



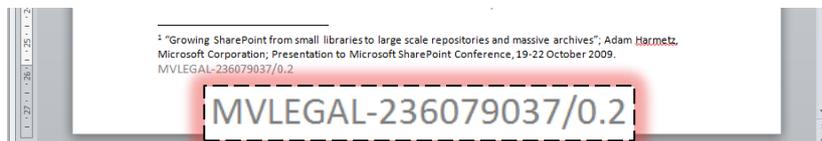
- Option to automatically check-out on open – removes the need to a user to check-out in a separate step.
- Search for documents *Checked Out to Me*.
- Right-click to open a version of a document or to inspect Version History.
- Version history preserved as you move a document between document libraries.
- Optional dialog on Close provides a streamlined experience which is familiar to users coming from a traditional DM system, including replacing an existing Major version as you save an edited document.



Document Numbering and Referencing

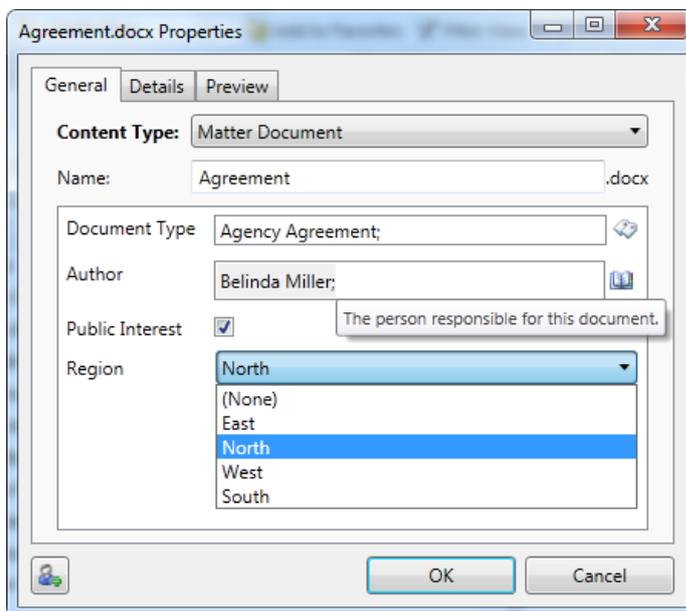
MacroView UDN is an optional module of MacroView DMF which extends and enhances the native unique document numbering capability of SharePoint to meet the needs of users experienced with traditional DM.

- Number documents uniquely across the entire SharePoint document store – not just within each Site Collection.
- Updates the caption of the Word window to show Document ID and current version.
- Footers of Word documents updated automatically to show Document Reference (Document ID, Version and other metadata).
- Improved control over the formatting of unique Document IDs, including starting offset.



Profiling / Metadata Handling

MacroView DMF builds on the inherent flexibility of SharePoint to make profiling / metadata capture a consistent experience - even easier and more efficient than with a traditional DM system.



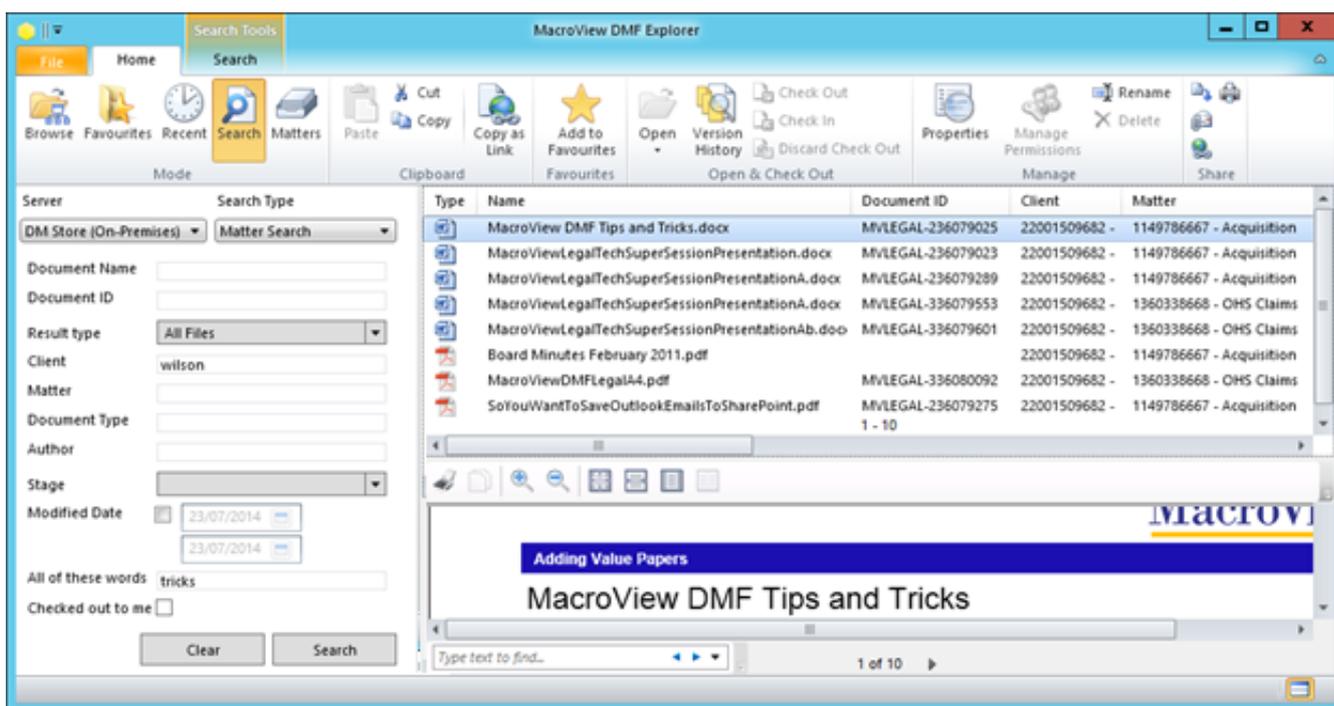
- Intuitive DMF Profiling dialog supports all SharePoint field types including Person/Group and External Data.
- Dynamically reflects library structure – new metadata columns appear automatically the next time a document is saved to the Library.
- Automatic recording of email attributes.
- Personal defaults reduce user profiling effort.
- Eliminates Document Info Panel (DIP).
- User-friendly interface for Managed Metadata columns, including browsing of term store hierarchies and type-ahead value selection.
- Prompt once-only when saving multiple files.
- Automatic metadata e.g. for Client, Project.
- Respects / reuses metadata on moving and copying files between document libraries.

“Thanks to MacroView DMF, user productivity was restored, even improved in several situations. That in turn has helped to make our new SharePoint-based document management a success.” **Mark Buttice, CIO, Mountain States Employers Council**

Intuitive, Convenient Searching for Documents and Emails

MacroView lets you harness the power of SharePoint (or FAST) Search while you continue to work in familiar applications such as Outlook, Word, Excel and PowerPoint or in MacroView DMF Explorer.

- Supports searching by metadata (including Document ID) and / or by text content.
- Finds PDFs based on their text content and emails based on text in their attachments.
- Supports wildcards, saved searches and searches for My Documents.
- MacroView Search Panels are readily configurable to reflect your metadata usage.
- Preview search results and browse to related documents without going to the web browser.
- Uses existing SharePoint / FAST indexes – no additional indexes or crawls required.



Save PDFs direct from Adobe Reader and Acrobat



- Save PDFs to SharePoint direct from Adobe Reader or Adobe Acrobat.
- Choose the destination document library or folder from the intuitive DMF tree-view display of the complete SharePoint store.
- Consistent, intuitive metadata capture.
- Versioning respected and existing metadata displayed for editing as you re-save a PDF back to SharePoint – ideal for workflow applications around PDF scanned images.

Efficient Navigation of Large SharePoint Document Stores

Document stores tend to grow large, so MacroView DMF and MacroView Message are designed to make it quick & easy to navigate to the area you want to work with in a large SharePoint document store.



- **Favorites** provide one-click access to areas that you work with frequently. You can add your own Favorites and Favorites can also be automatically pushed out to you – e.g. so you can share your Colleagues' Favorites.
- **Search Site Tree** uses SharePoint to perform an indexed search so that you can quickly locate to a site and document library– even if it is deeply nested.
- **The Matters** tab lets you pick a Matter that exists in your Practice Management System – DMF will auto-navigate to the document library (libraries) that correspond to the selected Matter.
- MacroView DMF and MacroView Message are designed to maximize responsiveness and minimize waste of bandwidth as you navigate. It does this by automatically filtering supported by **smart caching** – both server-side and client side.

"We were very impressed with MacroView's responsiveness, professionalism and reliability in helping us implement the MacroView DMF Professional Legal Pack. Our legal department is very satisfied with the finished product." **Chris Dial, Legal Counsel, Susser Holdings**

Office 365, OneDrive for Business and Hybrid Cloud Support

The MacroView tree-view can contain multiple SharePoint servers, multiple Office 365 / SharePoint Online site collections and OneDrive for Business personal sites – thereby providing a true hybrid cloud capability.

MacroView DMF supports all authentication methods including Claims-based, SSL and Integrated.

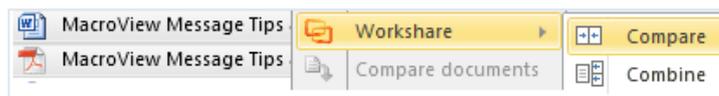
Extranet Document Collaboration That Business Users Can Manage



- Drag and drop to **move and copy** documents between on-premises document libraries and document libraries in the Microsoft cloud. Existing metadata will be re-used and version history retained on moves.
- The MacroView tree right-click menu can be customized to contain a *Create New Extranet* option – which allows even Contributor-level users to trigger the provisioning of a new extranet site hosted in Office 365.

Document Comparison – Workshare Integration

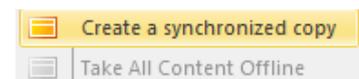
- MacroView DMF comes with an inbuilt link to the native *Review>Compare* feature of Microsoft Word 2010 and 2013. To perform a comparison, select two Word documents in a MacroView file list, right-click and select Compare Documents.
- Alternatively MacroView can customize the right-click to invoke Workshare Compare, and also so that Workshare Compare uses MacroView DMF to select the Word documents and PDFs to be compared. MacroView DMF can also surface within Workshare



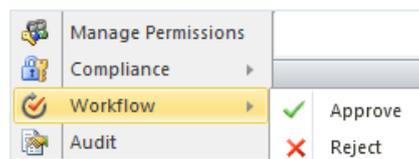
Mobile and Offline Operation

Contact MacroView for details of the **MacroView DMF Mobile** app for iOS and Android.

- If you have offline synchronization software such as SharePoint Workspace or OneDrive for Business installed, MacroView DMF will allow you to create a synchronized copy when you right-click on a document library, document set or folder in the MacroView tree. This uses your installed software to create a copy of the documents in the library / document set / folder that you can access and work with while you are offline.
- Otherwise MacroView DMF will display *Take all content offline*, which checks out all the documents and copies them to a folder structure on your C: drive for offline use. *Manage Offline Files* synchronizes any changes back to the original libraries.



Audit, Compliance and Workflow



- MacroView DMF provides convenient access to the Compliance features of SharePoint, such as Legal Holds & *Declare as Record*.
- The *Audit* option on the MacroView DMF right-click menu provides a convenient display of activity related to the selected document as recorded in the SharePoint Audit Log.
- MacroView can customize the right-click menu to add a *Workflow* option. This will only appear for documents that are ready for a workflow step, and only to users who have Approver permissions.

MacroView Stands on the Shoulders of SharePoint

MacroView DMF and MacroView Message extend and enhance the functionality and the user experience of Microsoft SharePoint, but do not change how documents and their metadata are stored in SharePoint, nor how SharePoint indexes and searches documents.