

# MacroView DMF Optional Modules

## And Document Automation Products

29 April 2015

Commercial in confidence

## 1. MacroView DMF Optional Modules

A number of optional **MacroView DMF** modules are available. These modules provide additional Document Management capabilities and can be combined with core MacroView DMF to create highly effective solutions.

The optional modules that are currently available for **MacroView DMF** are listed below. Each is described in more detail in following sub-sections:

- MacroView Enhanced Document Level Security (EDLS)
- MacroView Unique Document Numbering (UDN)
- MacroView Advanced Office Integration (AOI)
- MacroView Predictive Email Filing (PEF)
- MacroView Email Handler

### 1.1 MacroView Enhanced Document Level Security (EDLS)

**MacroView EDLS** significantly improves the user experience for setting document level security to a document that is stored in SharePoint.

When a Document, Workbook or Presentation is 'Saved to SharePoint' using **MacroView DMF** from a Microsoft Office application the user is prompted to enter metadata. When **MacroView EDLS** is installed this dialog will contain two additional controls, the *Private* check box (circled in red) and the adjacent *Manage Permissions* button.

By checking the *Private* check-box as you save a document to SharePoint you make it so that, for the time being at least, you are the only user with access to the document, even though many other users may have permission to the document library in which the document is stored. This is sometimes referred to making the document *For My Eyes Only*.

The user may specify permissions at a granular level by pressing the *Manage Permissions* button which will display the following window. The dialog contains a standard person/group lookup which you can use to pick users or groups you wish to assign specific permissions. There is a drop-down list of available permission levels which is automatically trimmed so that a user cannot self-elevate.

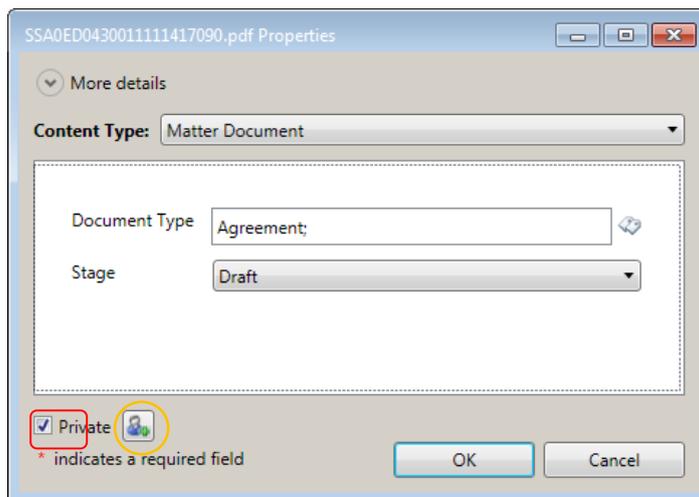


Figure 1: **MacroView EDLS** adds *Private* and *Permissions* controls to Profiling dialog

There is also a button that you can click to re-establish inheritance of permissions from the library level.

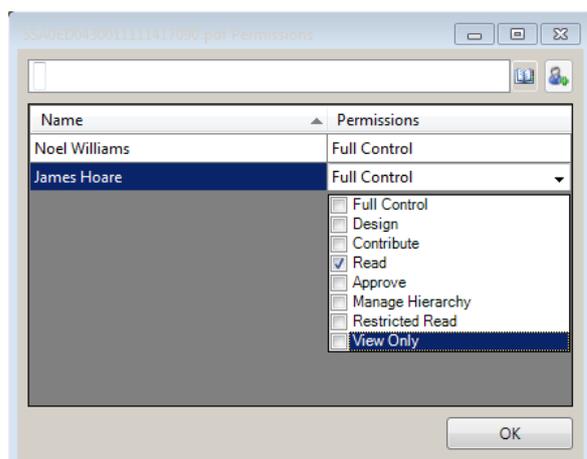


Figure 2: Manage permissions dialog - user James Hoare being assigned read level permissions

Note that the 'Private' check box will only appear when a file is first saved to SharePoint. The Permissions button will be visible whenever the user is prompted for metadata by MacroView **DMF**.

**MacroView EDLS** displays the new Manage Permissions dialog when you right-click a document, which makes it easy to specify quite granular permissions for that document – e.g. to grant Contributor level permissions to user Jane Jones and group Finance Users, while granting Read-only permission to Bill Brown and the Marketing group.

Importantly, this enhanced Document Level Permissions facility is usable by even Contributor-level users.

#### (a) Ensuring documents tagged 'Private' are accessible when a person leaves

A common issue with Document Management systems is recovering access to documents secured to a single person after that person leaves the organization. The EDLS module has two settings for managing this issue:

- A server setting that gives an Active Directory Group rights to a document whenever its rights are changed with **MacroView EDLS**.
- A user registry key can be set with Group Policy to prevent the 'Private' check-box from displaying. See Figure 1.

For details on how to configure these settings see the *MacroView DMF Installation and Configuration Guide* and the *MacroView EDLS Admin Guide*.

## 1.2 MacroView Unique Document Numbering

**MacroView UDN** replaces the OOB SharePoint Unique Numbering Provider, so that organizations can have the styles of unique Document IDs that they prefer.

The OOB SharePoint Document Numbering Provider uses coordinate style numbering – e.g.

<Site collection Prefix> - <List ID> - <Item ID>

With **MacroView UDN** documents are numbered sequentially, if necessary across the whole document store. The resulting numbering is effectively the same as in a traditional DM system.

**MacroView UDN** provides significant flexibility in relation to the formatting of unique Document IDs – e.g. *SALES 0000123*

**MacroView UDN** allows unique numbering to commence at an offset. This can be useful when migrating from another DM system.

**MacroView UDN** automatically ensures that unique Document ID and other Document Reference information (such as current Version Number) are displayed in the footers of documents that are opened from SharePoint into Microsoft Word or Microsoft Excel. **MacroView UDN** also refreshes the Document Reference in the footer as the document is saved to SharePoint – thereby ensuring that footers of documents will be correct when those documents are inserted as attachments.

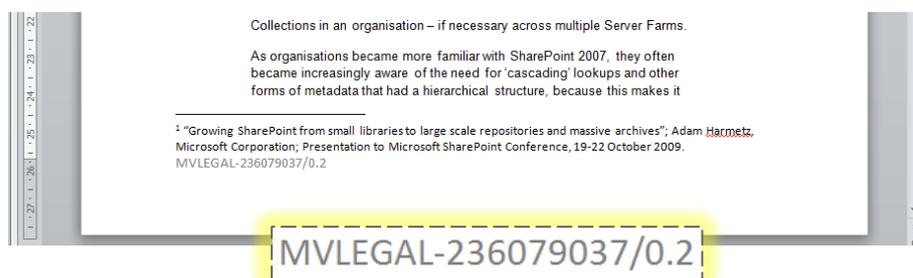


Figure 3: Word document with footer automatically inserted and updated by MacroView UDN.

The default location for inserting the Document Reference information in a document is the left side of the footer. This can easily be customized in your templates by adding a *custom document property* called *mvRef* and inserting it, appropriately formatted, at the desired location in the template.

MacroView can assist with customizations for Microsoft Office, e.g. so that document reference information appears on the first page only, at the end of the document only, or some other variation. Contact MacroView to discuss your requirements.

**MacroView UDN** allows an organization to define the particular combination of metadata attributes that they would like to appear in their Document References. An organization can define multiple such Document Referencing schemes, to nominate a default Document Reference scheme to apply to document libraries in a Site Collection and to override that default for a particular document library.

Generally **MacroView UDN** allows unique Document IDs that are more like those assigned by a traditional DM system.

The unique Document IDs generated by **MacroView UDN** can be used in conjunction with the *UseDocIdRedir* configuration setting so that hyperlinks to documents continue to work even after a document is moved. See the MacroView DMF User Guide for more information about techniques for inserting such hyperlinks.

### 1.3 MacroView Advanced Office Integration

**MacroView AOI** is an upscale version of MacroView UDN. In addition to the capabilities of MacroView UDN, MacroView AOI provides an enhanced

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experience when you close a document that has been checked out and opened from SharePoint for editing.

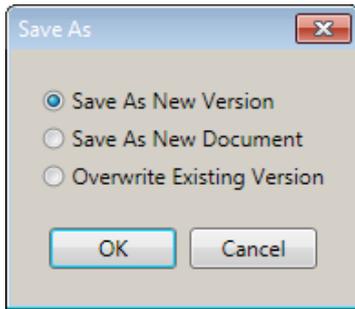


Figure 4: Dialog displayed by MacroView AOI as you close a document opened from SharePoint

If the document library has Major Version Only configured, **MacroView AOI** allows you to replace the existing version. This is something that legal users expect based on their experience with using a traditional DM system. This capability is NOT provided by the OOB integration of Microsoft Word and SharePoint, but it is supported by the SharePoint object model.

MacroView AOI eliminates a key issue with the OOB integration of Microsoft Word and SharePoint, which is the display of a dialog that asks the user whether they would like to *Discard Check Out*. If the user inadvertently chooses this option, all changes made since the document was checked out will also be discarded. This can lead to the unintended loss of days of work.

MacroView AOI also updates the caption of the Microsoft Word session to display the same Document Reference as MacroView UDN inserts and maintains (see above). This feature, which is also provided by traditional DM systems, makes it easy for the user to know what version they are working on without needing to inspect the footer.

## Predictive Email Filing

**MacroView Predictive Email Filing (PEF)** is an optional module for MacroView Message and MacroView DMF™. MacroView PEF is designed to assist in significantly reducing the effort associated with email filing.

As you save an email, MacroView PEF checks to see if the Subject contains a Tracking Tag. This Tracking Tag identifies the area in SharePoint where an earlier email in the same discussion thread has already been saved.

**DMF**  
v7.9

MacroView PEF can be configured to append and recognise MacroView Tracking Tags or to recognise User Defined Tracking Tags. MacroView Tracking Tags can have a prefix defined by an organisation when it implements MacroView PEF. The User Defined Tracking Tags approach provides an organisation with much more freedom in the way tracking tags are structured.

If no tracking tag is detected, MacroView PEF can suggest locations for saving the email, based on where other emails from the same sender (incoming emails) or to the same recipient (outgoing emails) have previously been saved by any user in the organisation.

If it finds a tracking tag in the Subject of an incoming or outgoing email, MacroView PEF can use it to automatically locate to that same location, so that the new email can be saved with either a minimum of effort, or no user effort at all (depending on configuration).

The user can also select a different area in which to save the email – by using the MacroView Save Message dialog in Browse, Favorites or Recent mode. If a different location is selected and MacroView Tracking Tags are in use, MacroView PEF will update the Tracking Tag in the subject of the email with a new tag that identifies the new save location that has been chosen. If MacroView Message / MacroView DMF has been configured so that a copy of the email is saved to SharePoint (i.e. the email is not deleted from the Inbox or other Outlook folders), the subject of the email in the Outlook folder is also updated.

## 1.4 MacroView Email Handler

MacroView Email Handler overcomes a key frustration of using email-enabled document libraries for managing emails in SharePoint.

By email enabling a SharePoint document library you are able to email directly into that library. Unfortunately the result is EML files that cannot be opened in Microsoft Outlook and attachments split off and saved separately so that it can be difficult to know what email they relate to.

When MacroView Email Handler is deployed, emails that arrive in the library via its SMTP email address are automatically saved in the same way as emails that you drag and drop into that library from Outlook using **MacroView DMF** or MacroView Message. MacroView Email Handler saves the complete email (including any attachments) in MSG format so that it can be open in Outlook. MacroView Email Handler names the MSG file to prevent duplicates and automatically records the attributes of the incoming email in like-named metadata columns. See the MacroView DMF User Guide for more details of how **MacroView DMF** / MacroView Message stores and names emails in SharePoint.

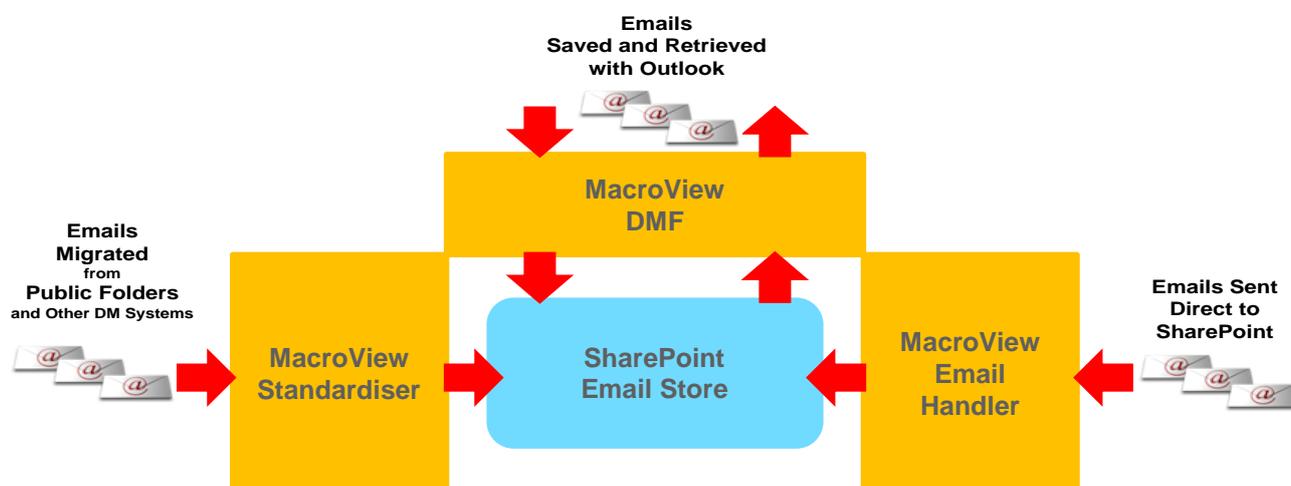


Figure 5: MacroView Email Handler forms part of a comprehensive Email Management solution

## 1.5 MacroView Standardiser

MacroView Standardiser is an STSADM command line utility that is generally useful when you are converting an existing SharePoint-based email management or document management solution that was previously designed to use another SharePoint add-on (or OOB SharePoint UI) and now is to use **MacroView DMF**.

MacroView Standardiser has been successfully used as part of bulk migrations for existing emails to SharePoint – e.g. by organizations looking to replace Public Folders with SharePoint.

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The Standardiser name reflects the way this utility can be used to:

- Standardize the structure of existing document libraries so that they are optimal for saving emails via **MacroView DMF** or MacroView Message. Specifically the Standardiser adds the metadata columns that **MacroView DMF** / MacroView Message can record automatically as it saves an email to SharePoint, or as it uploads a file to SharePoint from a Windows folder.
- Standardize the naming, formatting and metadata for existing email messages, so that they are consistent with emails that are saved by **MacroView DMF**. The existing emails can be in MSG format (saved by another SharePoint add-on, or moved in bulk from a traditional DM system) or in EML format (saved by the Email-enabled library mechanism of SharePoint).

MacroView Standardiser can trawl automatically through a Site or Site Collection, processing all document libraries or emails that are contained in that area of SharePoint.

MacroView Standardiser can be used to perform a number of other tasks that occur in the course of establishing or maintaining a SharePoint-based email or document management system. These include:

- Adding a new View to all libraries in a Site or Site Collection
- Adding a new Content type to all libraries in a Site or Site Collection
- Adding / removing a metadata column to all libraries in a Site or Site Collection

Contact MacroView for more details of the capabilities of MacroView Standardiser. MacroView can provide professional consulting services in relation to the effective utilization of MacroView Standardiser and / or extending its capabilities.

## 1.6 MacroView Migration Services

MacroView does not sell a Migration Toolkit. MacroView does however provide migration services utilising a collection of pre-built routines and programs that are relevant for creating a custom document migration solution.

For example, when migrating from shared drives (file shares) to SharePoint MacroView can automate the mapping from existing folder structures in shared drives to a site / sub-site / library / folder / document set / folder / metadata structure as is appropriate for a SharePoint document store. These mappings are defined and maintained using Windows workflow and are very flexible as a result.

By using the combination of MacroView's Migration Services and the MacroView Standardiser, MacroView can create a cost effective solution for migration of documents to SharePoint from Public Folders, shared drives and existing document management systems. Contact MacroView to discuss your requirements in relation to migration.

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## 1.8 MacroView Case and Matter

MacroView Case and Matter is the ideal document and email management solution for any organization where activity is organized into cases or matters, such as corporate legal departments. Users will find that the solution provides the advanced capabilities that they expect based on their previous use of a traditional DM system. MacroView Case and Matter also provides a convenient, easy-to-use way of managing the cases and matters.

MacroView Case and Matter unlocks the power of Microsoft SharePoint and Office 365, while at the same time providing an excellent experience for users working in Microsoft Outlook, Word, Excel, PowerPoint, Adobe Reader and Windows itself.

Contact MacroView to discuss your Client Matter integration requirements. MacroView can supply professional consulting services to assist with the integration of **MacroView DMF** with existing line-of-business systems for both provisioning and ongoing operation.

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## 2. MacroView Document Automation

### 2.1 MacroView ClauseBank

MacroView ClauseBank is relevant for document preparation, rather than document management.

MacroView ClauseBank streamlines document preparation by making it easy for a user in Word or Outlook to find, view and select standard, approved text and graphics for inclusion in the document or email message that they are preparing. MacroView ClauseBank can also be used to streamline the preparation of PowerPoint presentations.

A popular application of MacroView ClauseBank is the preparation of sales proposals and responses to Request for Tender. In this case the standard approved content is 'boilerplate' such as descriptions of products and services, product logos and pictures, profiles for professional staff members and sets of presentation slides.

MacroView ClauseBank retains formatting of content that it retrieves and inserts, which minimizes the formatting skills required of users in complying with corporate document layout and style standards.

MacroView ClauseBank can also ensure that out-of-date content is not re-used, and can automatically alert responsible users re content that is about to expire.

Behind the scenes MacroView ClauseBank uses Microsoft SharePoint libraries to store its re-usable content. Publishing new content or maintaining existing content is a simple matter of saving a document to SharePoint from Word or PowerPoint.

### 2.2 MacroView Precedent

MacroView Precedent is an automated document assembly tool. It runs in Microsoft Word by inserting special markup codes that indicate where variable content needs to be inserted, together with optional or multiple choice content. The markup codes support conditional logic and invocation of macros – with the result that complete packages of documents can be assembled automatically.

A strong feature of MacroView Precedent compared to other automated document assembly tools is its ability to retrieve data from SharePoint lists and existing data stores – in fact any store that can be accessed via a web service. MacroView Precedent also uses Microsoft SharePoint to record and manage Answer Files.

Combining MacroView Precedent with MacroView ClauseBank enables the creation of powerful document generation solutions that are also easy to use and maintain. Adding **MacroView DMF** enables the generated documents to be automatically stored and profiled in Microsoft SharePoint.

### 2.3 Custom Templates and Macros for Microsoft Office

If you have specialized requirements or want to maximize user productivity, MacroView can assist by designing and developing a custom template and macro solution for Microsoft Word, Excel or PowerPoint. MacroView has over 15 years experience and proven expertise with the customization and automation of Microsoft Office. Our custom document automation solutions are in use by organizations around the world. Ask for a demonstration.

# MacroView

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## About MacroView

Create | Collaborate | Manage

MacroView is a leader in document automation, email and document management solutions for Microsoft SharePoint® and Microsoft Office®.

Our solutions use the latest technologies across desktop, mobile and the cloud. MacroView software is licensed and used by hundreds of organisations globally across a diverse range of industries. Key features of the software include deep integration with Microsoft Office®, comprehensive document management functionality and efficient support for large volume SharePoint document stores.