

MacroView Document Management Framework (DMF)

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 efficient document management solutions that are popular with business users.

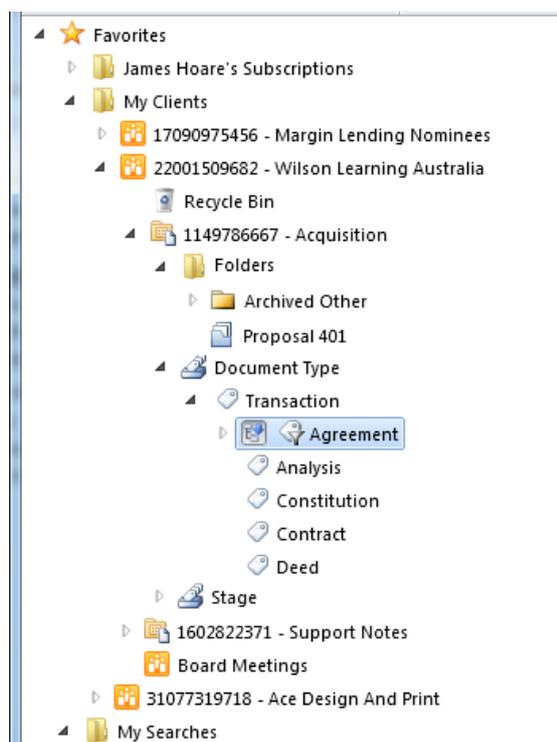
Document Management with Out-of-the-Box SharePoint can be Frustrating

MacroView DMF addresses many of the frustrations that are reported by users as they attempt to use the out-of-the-box interface for managing documents and emails in SharePoint. These include:

- Cannot drag-and-drop in Outlook to save emails and attachments to SharePoint
- Difficult to visualize and navigate the structure of the SharePoint document store.
- Poor performance when the SharePoint document store is large – e.g. library contains large number of folders and files.
- Need to leave the application where you are working (e.g. Word, Excel) to perform a Search across the SharePoint document store.
- Errors when you attempt to load a file whose name contains characters that are invalid in SharePoint.
- Difficult to save a PDF to SharePoint directly from Adobe Reader or Acrobat. Re-saving a PDF that you have opened from SharePoint forces you to re-enter metadata and lose version history.
- Existing metadata and version history not retained when you move a document to a document library in a different Site Collection.
- Inconsistent capture of metadata – no prompting for metadata when you upload multiple documents, with the result that documents may not be visible to other users.
- When you upload a file from Windows folder you lose its *Created Date* and *Author* details.

Intuitive Viewing and Efficient Navigation of Your SharePoint Document Store

MacroView DMF provides an intuitive, accurate tree-view display of your SharePoint document store, which makes visualizing the structure of that SharePoint store as familiar as using Windows Explorer.



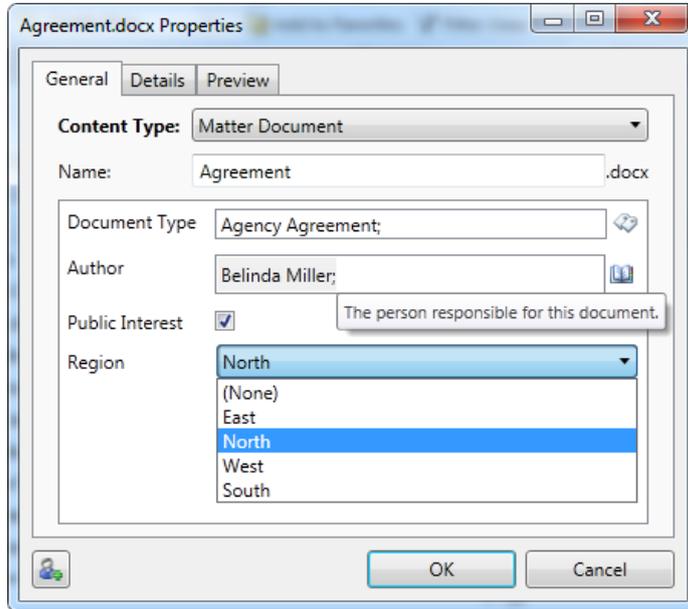
Favorites mode in MacroView DMF Explorer

- Handles your existing SharePoint structure – regardless of how many Web Applications, Servers, Site Collections, Sites / sub-Sites, Libraries, Document Sets or Folders.
- Paged display of unlimited numbers of files.
- Automatically security-trimmed, so that each user sees all areas that contain content for which he / she has access permission.
- *Favorites* allow one-click access to Sites, Libraries and Folders that you use frequently. You can declare your own Favorites and have Favorites automatically created for you (e.g. by subscribing to a Colleague's Favorites).
- Rapid access to files that you have recently saved and / or edited.
- *Search Site Tree* enables rapid navigation to a site or library – no matter how deeply nested.
- Automatic filtering as you expand a node that contains a large number of sub-nodes – e.g. a Site that contains more than 100 sub-Sites – ensures good performance and efficient resource utilization, even in very large SharePoint document stores.

Data Sheet

Profiling / Metadata Handling

MacroView DMF metadata capture is a consistent experience across the applications that that you use, including Outlook, Word, Excel, PowerPoint, Adobe Reader / Acrobat and Windows itself.



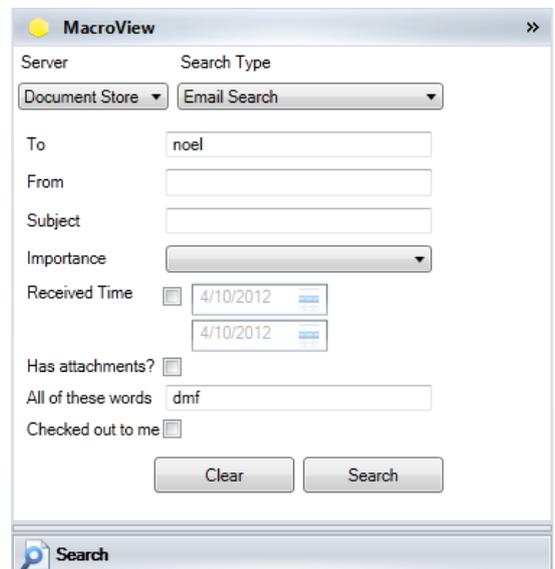
- Supports all SharePoint field types including Person/Group and External Data.
- Dynamically reflects library structure – new metadata columns appear automatically the next time a document is saved to the Library.
- Automatic recording of email attributes.
- Personal defaults reduce user profiling effort.
- Eliminates Document Info Panel (DIP).
- User-friendly interface for Managed Metadata columns, including browsing of term store hierarchies and type-ahead value selection.
- Prompts when you save or upload multiple files, including option to prompt once-only for common metadata.
- Respects / reuses metadata on moving and copying files between document libraries.

Intuitive, Convenient Searching for Documents and Emails

MacroView DMF lets you harness the power of SharePoint 2010 (or FAST) Search while you continue to work in familiar applications such as Outlook, Word, Excel and PowerPoint.



- Supports searching by metadata (including Document ID) and / or 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* and for *Documents Checked Out to Me*.
- Supports FAST refiners.
- MacroView DMF Search Panels are readily configurable to reflect your metadata usage.
- Preview search results and browse to related documents while you are working in Outlook.
- Uses existing SharePoint / FAST indexes – no additional indexes or crawls required.



Save PDFs direct from Adobe Reader and Acrobat



More and more PDFs are being generated by smart copiers and received as email attachments. MacroView DMF provides best-available support for saving and re-saving PDFs to SharePoint.

- 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 document 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.

“For my money, MacroView’s email management capabilities are the best available in the market bar none. My users can now drag and drop emails to SharePoint without prompting or duplication. They can also search for emails and documents in SharePoint without leaving Outlook.” **Aaron MacDougall, IT Director, Ballentine Partners**

MacroView Document Management Framework (DMF)

Excellent Outlook-to-SharePoint Integration



“The first thing that attracted us to MacroView DMF was its intuitive tree-view available in Outlook. Without the DMF tree-view, our people would not be able to work efficiently and effectively with SharePoint.”
Bogdan Ungureanu-Manole
IT Application Support Manager, Kinstellar

View and Navigate the DM Store from Outlook

- MacroView DMF adds a new pane in Outlook, which displays all areas of SharePoint for which you have permission. Views of libraries are displayed in the right pane of Outlook.
- New pane in Outlook provides intuitive interface for searching across the SharePoint DM store with results displayed in Outlook.
- Formatted previews of files in SharePoint, without needing to download and open.
- Extensive right-click menu for files and areas.
- Right-click to create new Libraries & Folders.
- One-click access to your Favorite document libraries and folders in SharePoint.
- Automatic creation of Favorites – e.g. for Projects for which you are a timekeeper.

Email Filing

- Drag and drop to save emails or attachments to ANY area where you have permission.
- Automatic capture of email attributes and automatic naming to prevent duplicates.
- Saving performed in the Background.
- Visible indicator that an email has been filed.
- Rule-based filing of sent emails.

Attachment Handling

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

Type	Name	Document ID	Version	Modified	Author	Checked Out To
Folder	Archived Proposals		1.0	7/18/2012 3:55 PM		
Folder	Archived Other		1.0	7/18/2012 3:54 PM		
Document	OptimalDesignsSharePointDM.pdf	MVLEGAL-236079302	1.0	10/4/2012 12:07 PM	Belinda Miller	
Document	Agreement.docx	MVLEGAL-236078835	42.0	10/4/2012 9:21 AM	James Hoare	
Document	Meeting Agenda - 17 Sep 2010.docx	MVLEGAL-236011471	2.0	10/3/2012 5:07 PM	Noel Williams	Noel Williams
Document	Itinerary - Moscow - Jan 2011.docx	MVLEGAL-236011429	1.0	10/3/2012 4:59 PM	Noel Williams	Noel Williams
Document	Board Minutes February 2011.pdf	MVLEGAL-236011326	10.0	10/3/2012 4:53 PM	MACROVIEWDEMO	
Document	MacroView DMF Tips and Tricks.docx	MVLEGAL-236079292	1.0	9/27/2012 11:11 AM	James Hoare	
Document	CaseStudyWinstonStrawnDMFLegal.docx	MVLEGAL-236078996	1.0	9/20/2012 6:32 AM	James Hoare	
Document	CaseStudyMSECDMF.pdf	MVLEGAL-236079262	3.0	9/19/2012 11:35 AM	James Hoare	
Document	SoYouWantToSaveOutlookEmailsToSharePoint.pdf	MVLEGAL-236079275	2.0	9/13/2012 5:14 PM	James Hoare	
Document	scanner_12Jul12 14.41.17_IDM BRS.msg	MVLEGAL-236079271	1.0	9/13/2012 1:47 PM	James Hoare	
Document	Income Statement 2010.xlsx	MVLEGAL-236011425	1.0	9/13/2012 1:47 PM	James Hoare	
Document	MacroViewDMF.docx	MVLEGAL-236078997	3.0	9/11/2012 2:45 PM	James Hoare	
Document	Board Minutes January 2012.pdf	MVLEGAL-236079120	3.0	9/7/2012 10:38 AM	Belinda Miller	

MacroView
Adding Value Paper
Optimal Designs for Managing Documents in SharePoint
In this paper MacroView Founder and CEO Noel Williams looks at how MacroView DMF enables optimal designs for managing documents and emails in SharePoint.

Introduction
As more organizations explore the potential of using Microsoft SharePoint for Document Management and Email Management a question that arises frequently is "What is the best Information Architecture for a SharePoint DM store?" In other words, what is the best way to arrange the various SharePoint 2010 'building blocks' – Site Collections, Sites, Document Libraries, Document Sets, Folders and metadata columns – to come up a design that is optimal in terms of volume handling,

Uploading, Downloading, Moving and Copying Documents

- You can **upload** one or multiple documents from any Windows folder to SharePoint by dragging and dropping to the MacroView DMF tree-view. DMF will prompt for metadata as defined in the destination library. You can opt to supply common metadata, rather than be prompted separately for each document.
- You can **download** a document or multiple documents by selecting them in any DMF file list and drag and drop or right-click, *Download*.
- MacroView DMF supports **moving** one or multiple documents from one library to another. You simply drag and drop in the DMF tree-view or use *Cut* and *Paste*. As it moves, MacroView DMF will retain existing version history and re-use existing metadata, even if the destination library is located in a different Site Collection or Web Application (relevant for moving between an extranet and an in-house document store).
- **Copying** documents is also intuitive with DMF.

"SharePoint has emerged as a viable and economical solution in the DM space. SharePoint 2010 coupled with MacroView creates a legal specific DM system with all of the elements required for a firm our size including custom document numbering, version control, true Outlook integration and custom handlers for the saving of documents in the Microsoft Office applications and Adobe Acrobat."

Matt van Ordstrand, Senior Manager Practice Support Services, Winston & Strawn LLP

Good Performance, even with the Largest SharePoint Environments

The operation of the MacroView tree-view pane in Outlook is covered by pending patents in both USA and Australia.

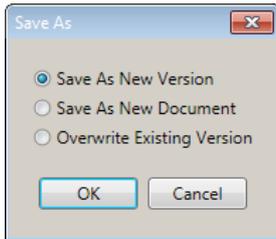
Other SharePoint document management add-ons available in the market add extra folders to the Mail Folders pane of Outlook to represent the structure of nominated areas of the SharePoint store. This tends to cause the Mail Folders pane to fail as the SharePoint environment grows, or if certain sites have a large number of sub-sites, libraries and folders.

The purpose built tree-view pane added by MacroView DMF avoids this issue, which is why numerous organizations make the move to MacroView DMF to cope with their growing SharePoint environments. The MacroView tree-view accurately depicts the SharePoint structure and it is designed to cope efficiently with arbitrarily large SharePoint environments.

Offline Support

If you are running Office 2010 Professional Plus, the right-click menu of MacroView DMF will contain a *Connect to SharePoint Workspace* item. This streamlines the creation of a SharePoint Workspace so that multiple users, including those working offline, can collaborate on emails and associated attachment files.

Advanced Document Management Features



MacroView DMF automatically checks out documents as they are opened from SharePoint for editing. DMF also provides a rich right-click menu, with options for *Check-In / Discard Check Out* and for viewing and opening the available versions of a document. MacroView DMF also facilitates record declaration and legal holds.

Enhanced Document Level Security (EDLS)

This optional DMF module streamlines the setting of document-level permissions, even by *Contribute* level users. By checking a *Private* box you can make a document 'For My Eyes Only'. You can also assign specific access to selected other users and groups.

MacroView Advanced Office Integration

This optional DMF module enhances and extends native SharePoint unique document numbering and streamlines checking in a document that has been checked out and edited. Benefits include:

- Numbering across a whole Web Application rather than a Site Collection.
- Automatic Update of footers of Office documents to display unique document id, version number and other Document Reference information.
- Prevents accidental discarding of changes when closing a checked-out document.

Stands on the Shoulders of SharePoint

MacroView DMF dramatically improves the user interface experience, but does not change how documents or their metadata are stored in SharePoint, nor how SharePoint indexes and searches for documents. MacroView DMF makes all its access to the SharePoint content database via the Microsoft-supplied low-level Object Model layer. The result is that MacroView DMF fully respects the SharePoint security model, does not restrict use of third-party applications – e.g. K2, Nintex, StoragePoint, etc – and lets you access and manage the SharePoint document store via the web browser.

Streamlined Deployment and Support for SharePoint and Microsoft Office Versions



The MacroView DMF tree-view can display the Site Collection / Site / Library / Folder structure of multiple SharePoint Web Applications – running under SharePoint Server 2010, SharePoint Foundation 2010, MOSS 2007 or Windows SharePoint Services v3.

MacroView DMF server-side components play a key role in enabling full functionality and volume handling. These components are installed by a SharePoint Solution (WSP).

On client PCs, MacroView DMF will run in Office 2010 or Office 2007. This means that you can stage your deployment of Office 2010 – you do not have to run Office 2010 to be able to have good integration with SharePoint 2010.

MacroView DMF client-side components are installed by using an Active Directory MSI. Extensive client side configuration settings are compatible with A/D Group Policy, and MacroView can supply a sample Group Policy ADM template.