

MacroView Predictive Email Filing

An optional module available for MacroView DMF and MacroView Message, MacroView Predictive Email Filing further streamlines the saving of emails from Outlook to SharePoint by suggesting appropriate locations for saving incoming and outgoing emails and by automating the saving of subsequent emails in a conversation thread.

MacroView Tracking Tags Automate the Saving of Emails

If MacroView Predictive Email Filing is active, MacroView Message and MacroView DMF will append a MacroView Tracking Tag to the Subject of an email as that email is saved to SharePoint. The Tag is appended to both the email that is stored in SharePoint and also to any copy remaining in Outlook.

From	Subject	Received	Size	Categories
Noel Williams	Microsoft Case Study - SharePoint 2010 adoption [MV36]	Wed 20/04/2011 8:16 AM	183 KB	Saved to SharePoint
Noel Williams	RE MacroView Presentation - Share 2011 [MV31]	Thu 21/04/2011 7:12 PM	110 KB	Saved to SharePoint
Noel Williams	RE MacroView in the UK [MV32]	Wed 27/04/2011 11:08 PM	40 KB	Saved to SharePoint
Noel Williams	Boot Camp Agenda [MV35]	Fri 6/05/2011 6:00 PM	112 KB	Saved to SharePoint
Noel Williams	MacroView Shirts [MV34]	Mon 9/05/2011 3:17 PM	532 KB	Saved to SharePoint

Inbox with emails that have been saved to SharePoint – note MacroView Tracking Tags [MVxx] appended to Subjects.

MacroView Predictive Email Filing lets you strike the balance that you prefer between full automation and full control of your email saving.

Fully Automatic

- Incoming emails that contain a Tracking Tag will automatically be saved to the location identified by the Tracking Tag. Combining this setting with a fully automatic metadata design means that emails can be saved to SharePoint with zero user effort.

Semi-Automatic

- To save an email that contains a Tracking Tag you simply drag and drop the email to the *Drag files here...* drop zone that appears at the top of the MacroView Pane once MacroView Predictive Email Filing is installed. The email will then be saved automatically to the location identified by the Tracking Tag.

Manual

- If you drag and drop an email that contains a Tracking Tag to the *Drag files here* drop zone, the MacroView save dialog will display, already located on the document library, document set or folder that is identified by the Tracking Tag. You can then see a list of other locations where emails from the same Sender have been saved, view the existing emails and documents in those locations and so choose where you want to save the new email. See the screen shot below.
- You can also drag and drop directly to the *Favorite* or *Browse* mode location where you want to save. If necessary, the Tracking Tag will be updated to reflect the new location.



Document ID	Version	Modified
	1.0	7/18/2012 3:54 PM
	1.0	7/18/2012 3:55 PM
your shopping.r	MVLEGAL-236011383	1.0
yourself to sa.ms	MVLEGAL-236011387	1.0
	MVLEGAL-336079110	1.0
	MVLEGAL-336080099	1.0
.lmsg	MVLEGAL-236078835	92.0
	MVLEGAL-336080292	3.0

"Thanks to MacroView Predictive Email Filing I only have to choose a location for saving the first email in a conversation – all subsequent emails in that conversation are filed automatically to the same location."

Clicking the *Show suggested locations* button will display a list of relevant save locations. The first suggestion will be the location identified by the Tracking Tag. Other locations where emails from this Sender (or to this Recipient, for outgoing emails) have recently been saved will also be displayed, with the most recently used location shown first.

Suggested Saving Locations

If the Subject of the email that you are saving to SharePoint does not contain a MacroView Tracking Tag, MacroView Predictive Email Filing will suggest some locations where you might want to save.

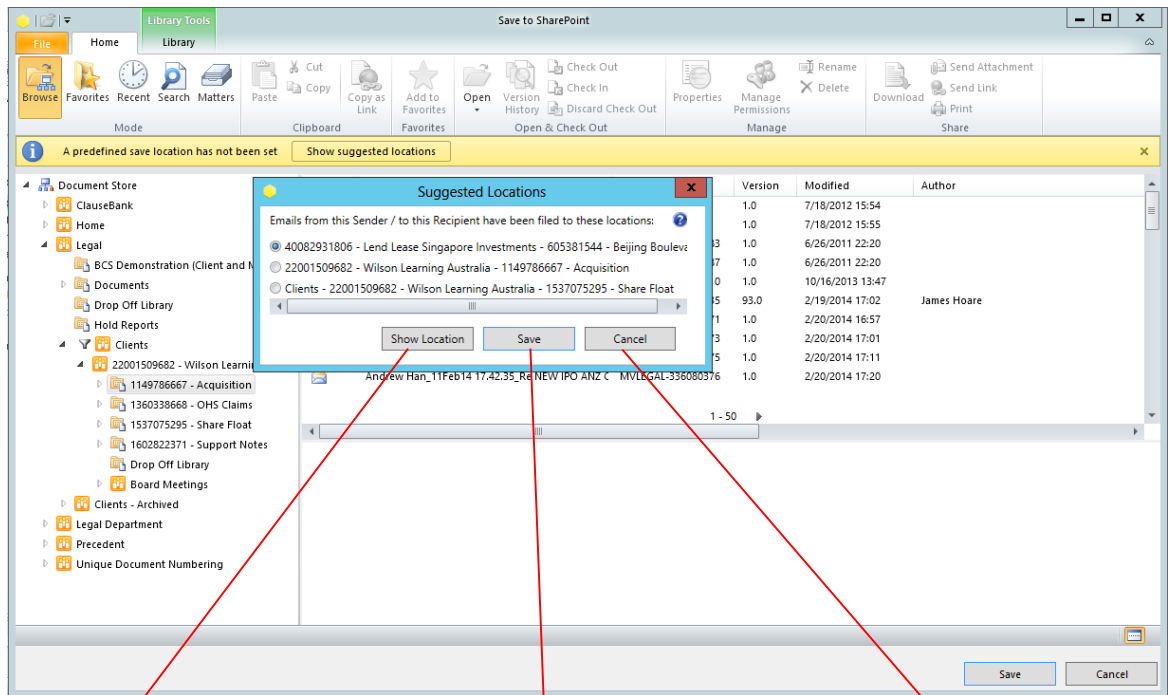
Streamlines saving by suggesting and auto-navigating to locations where emails from the same Sender / to the same Recipient have recently been saved.

Incoming Emails

- The Suggested Filing Locations are locations where other emails from the same Sender have recently been saved, either by you or other users. The locations are listed in the order in which they have been used, with the most recently used location displayed first.

Outgoing Emails

- The Suggested Filing Locations are locations where other emails to the same first Addressee have recently been saved, either by you or other users. The locations are listed in the order in which they have been used, with the most recently used location displayed first.



Navigates the MacroView tree to the selected suggested location so that you can see the emails and other documents that have already been saved to that area, before you commit to save.

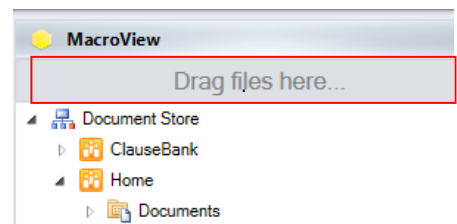
Saves the email to the suggested location that you have selected – also if you press Enter.

Ignore the suggested locations and instead use the intuitive MacroView Save dialog – in Browse, Favorites, Recent or Search mode – to choose a location where you want to save the email.

Whichever way you choose to save, the Subject of the saved email will be updated automatically to include a Tracking Tag, which will dramatically speed up the saving of subsequent emails in the same conversation. Any copy of the email in your Inbox or Sent Items will also have its Subject updated.

Drag and Drop Now Even Easier

Activating MacroView Predictive Email Filing adds a *Drag files here...* drop zone to your MacroView pane. If you drag and drop an email to this zone, MacroView Message / MacroView DMF will determine the actual save location using the MacroView Tracking Tag in the Subject of the email. Saving by drag and drop just got easier!



Technical Requirements:

- Requires MacroView DMF / MacroView Message v7.8 or later.
- Requires Microsoft SharePoint Server 2013 or SharePoint Server 2010.
- Supports Microsoft Outlook 2013, 2010 and 2007.

