

MacroView Case and Matter Solution

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 law firms and 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 to create and archive the storage areas for cases and matters in SharePoint.

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

Familiar experience when managing documents and emails for Cases / Matters

MacroView Case and Matter provides best-available support for interacting with a document store in Office 365 / SharePoint Online or in on-premises SharePoint while you work in Microsoft Outlook, Word, Excel or PowerPoint. It also provides a Windows File Explorer-like interface. MacroView Case and Matter makes SharePoint feel as familiar as working with trees of folders in Windows file shares or Outlook.



Familiar User Experience

- Browse a tree-view of areas corresponding to cases and matters in your on-premises SharePoint Server or Office 365 tenancy.
- Click to preview and open the documents and emails stored for cases and matters.
- Drag and drop to save emails and attachments to areas corresponding to cases and matters.
- Drag and drop to upload one or multiple documents from any Windows folder.
- Right-click menu provides a full range of features for working with documents & emails such as opening, sending as attachments, etc.
- Consistent experience across Microsoft Office, Adobe and MacroView DMF Explorer.



The screenshot shows the Outlook interface with the MacroView pane open. The pane displays a list of documents and emails, with a right-click context menu open over one of the items. The annotations highlight the following features:

- Formatted previews of documents and emails stored in on-premises SharePoint.** (Points to the document preview area)
- Click on a case or matter area to see its documents and emails.** (Points to the 'Cases & Matters' tree view)
- Rich, Windows-style right-click menu.** (Points to the context menu)
- Familiar tree-view display of available cases / matters.** (Points to the 'Cases & Matters' tree view)

MacroView pane lets you save, retrieve and manage documents and emails for cases / matters directly from Outlook.

“MacroView Case and Matter is a comprehensive solution for a legal department or law firm. It provides an intuitive and convenient way to generate, save, search for, open and generally manage documents and emails for matters, as well as an easy way to manage the matter storage areas.”

Profiling / Metadata Handling

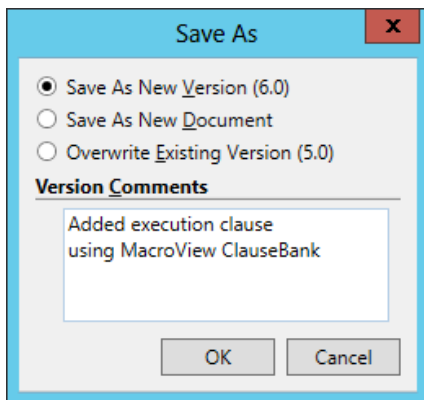
MacroView Case and Matter captures metadata to make it easier to find documents and emails. Most metadata is captured automatically, but when it does prompt the user for metadata the user experience is easier and more efficient than with a traditional DM system.

- Fully automatic capture of email attributes.
- Automatic recording of Case / Matter.
- Option to be prompted only once for metadata when saving multiple files.
- The solution comes with predefined metadata attributes *Matter Type*, *Matter Status*, *Document Type* and *Document Author* – which can be configured and extended to reflect your local usage and requirements.

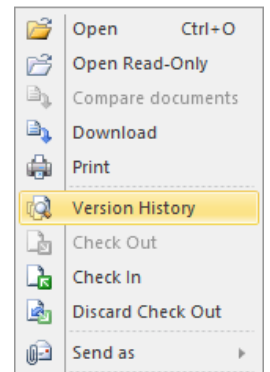
Advanced Document Management Functionality

Check-Out, Check-In, Version Handling

MacroView significantly enhances the user experience and extends the capability of SharePoint for check-out, check-in and version handling, creating an attractive alternative to a traditional DM system.



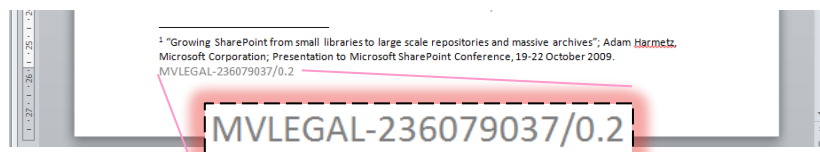
- Option to automatically check-out on open – removes the need for a user to check-out in a separate step.
- Search for documents *Checked Out to Me*.
- Right-click to open a version of a document, to inspect version history, send as an attachment or link, etc.
- Metadata re-used and version history preserved as you move a document to a different Case / Matter.
- As you close a Word document that you have edited you have the same options as in a traditional DM system, including replacing an existing major version and saving as a new document.



Unique Document Numbering

MacroView Case and Matter includes MacroView UDN, which extends and enhances the native unique document numbering capability of SharePoint to meet the needs of users experienced with traditional DM.

- Documents are numbered sequentially across the entire SharePoint document store.*
- Document footers and window captions in Microsoft Word automatically updated to show Document ID and current version.



Enhanced Document Level Security*

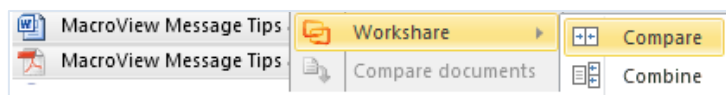
- Any MacroView Case and Matter user who can save a document can easily set access permissions for that document, such as making a sensitive document *My Eyes Only* and assigning specific levels of access to selected other users and / or groups.

Document Comparison

- MacroView Case and Matter comes with an inbuilt link to the native *Review>Compare* feature of Microsoft Word (2010 – 2016). Integration with Workshare Compare (Delta View) is an available option.

Audit, Compliance and Workflow

- MacroView Case and Matter provides convenient access to the Compliance features of SharePoint, such as *Legal Holds & Declare as Record* *. You can also right-click to advance a document to the next stage in a workflow.
- The *Audit* option on the MacroView Case and Matter right-click menu provides a convenient display of activity related to a selected document recorded in the SharePoint Audit Log.*



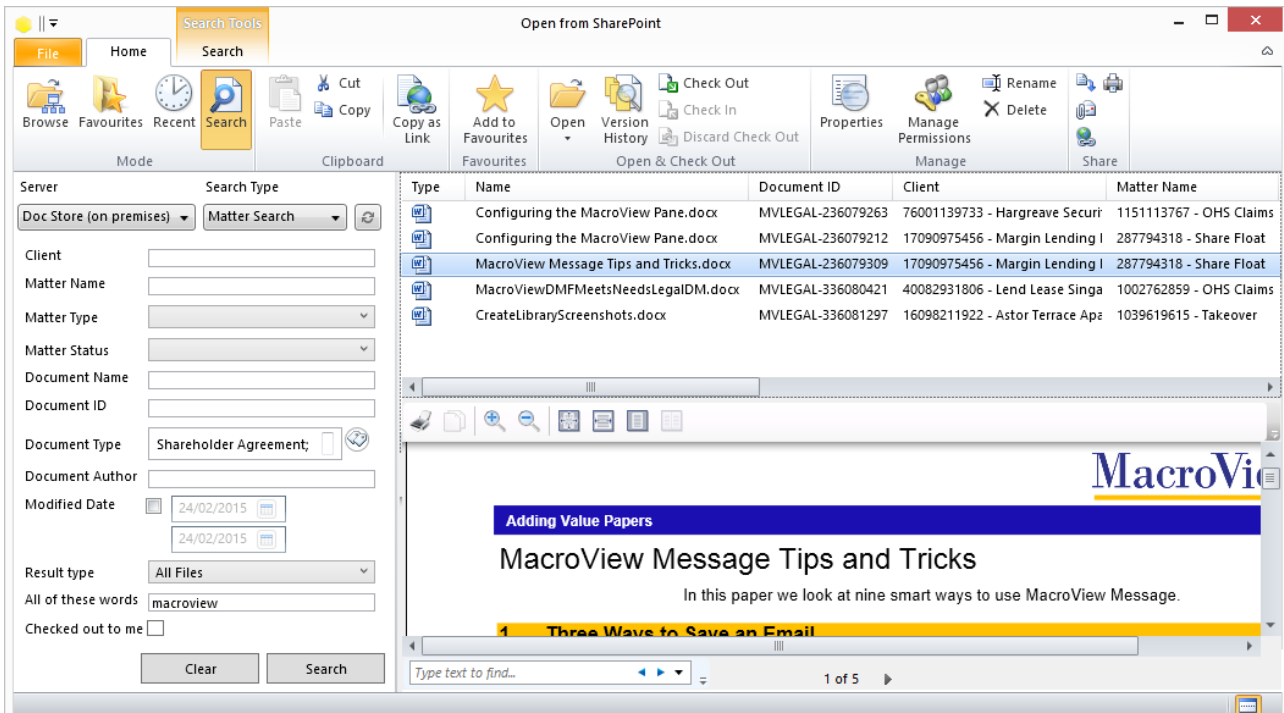
* Available in on-premises implementations of MacroView Case and Matter

“MacroView Case and Matter uses your existing Microsoft SharePoint infrastructure, which makes it highly cost effective. Users can keep working in familiar applications – they don’t know or care that MacroView uses SharePoint behind the scenes.”

MacroView Case and Matter Solution

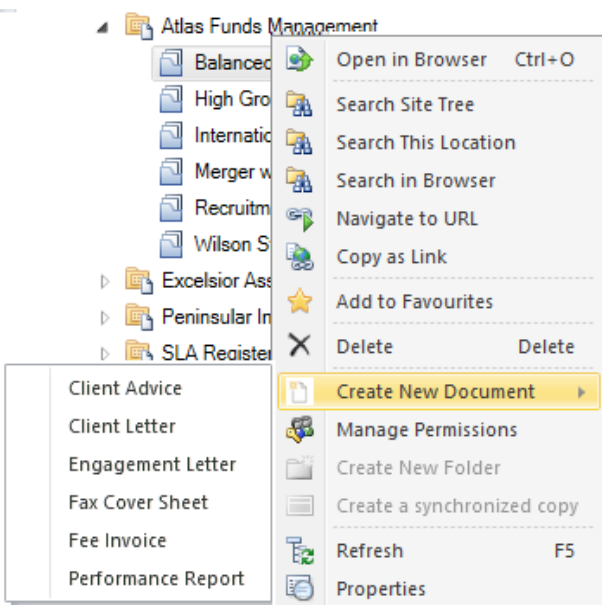
Intuitive, convenient searching for documents and emails related to Cases / Matters

Search for documents and emails based on their content and / or their metadata – without needing to leave Outlook, Word, Excel or PowerPoint and jump into the web browser. MacroView Case and Matter provides an intuitive search interface, which is powered behind the scenes by the Microsoft SharePoint search engine. The MacroView search experience can readily be tailored to reflect your specific needs.



Matter Search panel in Microsoft Word - makes it easy to search for documents related to Matters

Streamline the generation of documents for Cases / Matters



MacroView Case and Matter makes it easy to generate new documents and have them saved and profiled in the area corresponding to a Case or Matter. You simply right-click on the area for the Case / Matter, choose *Create New Document* and then select the document type you want to generate. The solution automatically displays a menu of the Office templates that you would see in Word, Excel and PowerPoint.

MacroView can develop custom Office templates with the latest user interface features, including automatic recording of the metadata that has been included in the generated document.

Optional Module - MacroView ClauseBank

MacroView ClauseBank further streamlines the preparation of documents by making it easy to find, preview and re-use standard, approved text and graphics content that is managed in a central SharePoint site. MacroView ClauseBank prevents use of out-of-date content, maintains formatting (including numbering styles) and also makes it easy for business users to propose new content items to keep the ClauseBank relevant to changing business needs.

Integration with Line of Business Systems and Automatic Provisioning

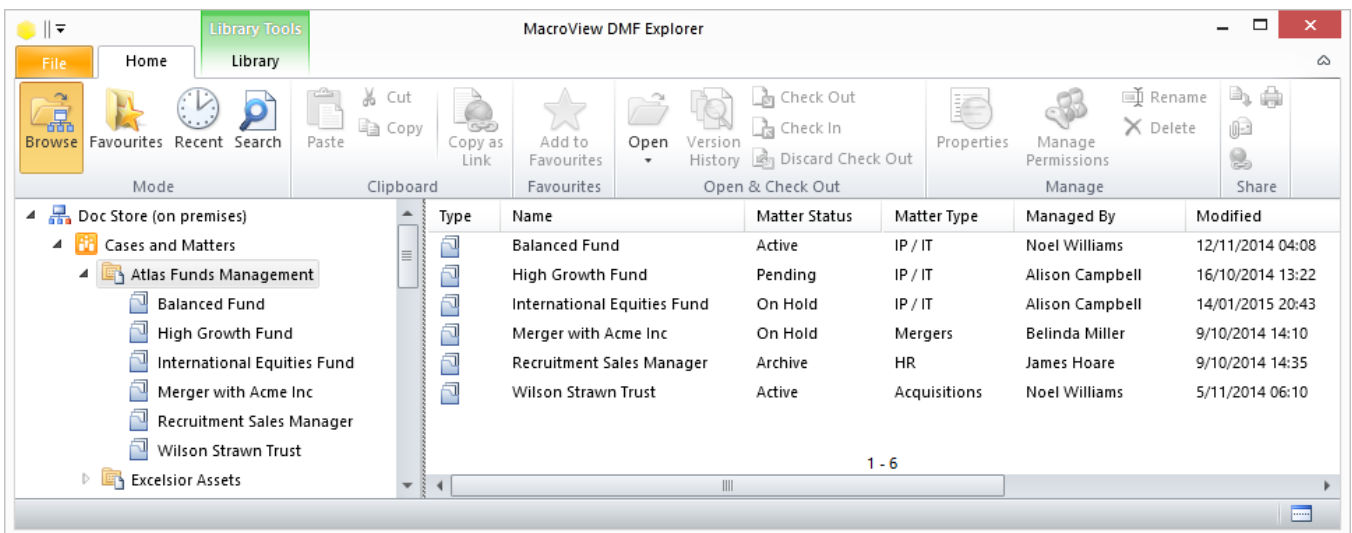
MacroView Case and Matter provides good support for integrating with Practice Management, CRM or other line-of-business systems that are used to track Clients and Matters. A simple-to-implement integration is Smart Hyperlinks that auto-navigate to the area in SharePoint that corresponds to a Matter. Provisioning APIs are also available to enable the automatic provisioning of new Client and Matter areas.

“We were very impressed with MacroView’s responsiveness, professionalism and reliability in helping us implement the solution. Our legal department is very satisfied with the finished product.” **Chris Dial, Legal Counsel, Susser Holdings**

A simple way to manage the storage areas for Cases and Matters

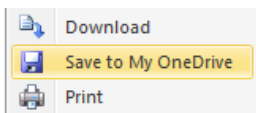
MacroView Case and Matter provides a simple yet effective way to manage the SharePoint areas where the documents and emails for Cases or Matters are stored. Clients and their Matters can be grouped in a way that makes sense to your organization – e.g. all the Matters for a Practice Group, all the Cases for a Year, etc. Clicking on a Matters library displays a list of Cases / Matters, together with their metadata attributes. You can efficiently find and navigate to a wanted area even in the largest document stores.

- Filter and sort using metadata to drill down to the Case / Matter that you want to work with.
- Right-click>Create Client, Create New Matter.
- Clicking the entry for a Case / Matter drills down to display the documents and emails that have been stored for that Case / Matter – along with their metadata attributes.
- Right-click on the entry for a Case / Matter to update its metadata – e.g. Status to *Inactive*.
- Archive a Case / Matter by right-clicking it and choosing *Archive Case / Archive Matter*.
- If required, any user who can save documents can create a new Case / Matter – simply by right-clicking the relevant Matters library.



Viewing the list of Matters for a client using MacroView Case and Matter in MacroView DMF Explorer

Mobile and Offline Operation



- If you want to work with a selection of documents while you are out of the office you can right-click and save them to your personal cloud store – e.g. *Save to My OneDrive*, *Save to My Box*. When you return to the office you can upload the modified documents and create new versions of existing documents in the Case / Matter document store.
- In Office 365 / SharePoint Online implementations, documents and emails saved using MacroView Case and Matter while you work on your Windows desktop are available as Recent documents in the SharePoint and OneDrive apps on iOS and Android devices and in Microsoft Word on the iPad.

Office 365, OneDrive for Business and Hybrid Cloud Support

MacroView Case and Matter can be implemented with both on-premises SharePoint Server and with the SharePoint Online that comes as part of an Office 365 subscription. MacroView Case and Matter can support hybrid document stores that utilise both SharePoint Server on-premises and SharePoint Online.

“Microsoft is investing deeply in hybrid, to enable customers to take advantage of cloud capabilities at their own pace.”

Julia White, General Manager, Office Product Management Team, Microsoft, 2 February 2015
(<http://blogs.office.com/2015/02/02/evolution-sharepoint/>)