MacroView

MacroView ClauseBank

Looking for a easy-to-implement, business-user-friendly way to make document preparation faster but with high-quality presentation and reduced risk of incorrect / out-of-date content? MacroView ClauseBank™ may well be the solution you need.

Find and ReUse Standard / Approved Text and Graphics Content

MacroView ClauseBank improves the accuracy and efficiency of document preparation in Microsoft Office, by making it easy to find and re-use standard / approved text and graphics, such as product feature and service descriptions, customer and product logos, consultant profiles, CVs, disclaimer texts and clauses for insertion into contracts and proposals.

Eliminates the need to hack from previously generated documents and the associated risk of re-using incorrect / inappropriate content.

Easy to Use

- Works in Microsoft Word, Outlook and PowerPoint 2010, 2013 and 2016.

- Available content items are displayed in a hierarchical menu structure that is tailored to your organization.

- Powerful search, formatted **previews** and optional descriptions help you to find the correct content items.

- Out-of-date content cannot be selected.

- **Drag and drop** to select content items.

- Text and graphics content of selected items is inserted at the current cursor position with **styles and formatting maintained**.

- Full Unicode support, including for languages requiring double-byte characters.

Easy to Maintain

- Quickly create and save new clauses from Microsoft Word into the ClauseBank.

- Content items are stored in a central SharePoint site. New / revised content is immediately available to all authorized users.

- Tailor your content menu by naming your Clause Libraries, Folders or Categories.

- Nominate a **Content Expert** for each item – which can be an individual user or a group.

- Option to specify **Update Frequency** so that new / modified content items are automatically assigned an Expiry Date. Content Experts are alerted by email of any expiring items.

- Usage of content items is logged so that key users can generate a report of **usage metrics**.

MacroView ClauseBank displays a menu of available content, and a preview of selected content item.

Keeping the Central Content Store Up-to-date and Relevant

MacroView ClauseBank addresses a key challenge for any centralised content management system – which is how to keep the central content store up-to-date and relevant.

ClauseBank does this by making it easy for end-users to propose new content items. While working in Word they simply highlight the new content (text and / or graphics) and click *New Clause* – MacroView ClauseBank will prompt for any required metadata and save the new content item.

Newly added content items (clauses) can be subject to an **approval workflow** before they become visible to other users.

Uses SharePoint to Streamline Deployment
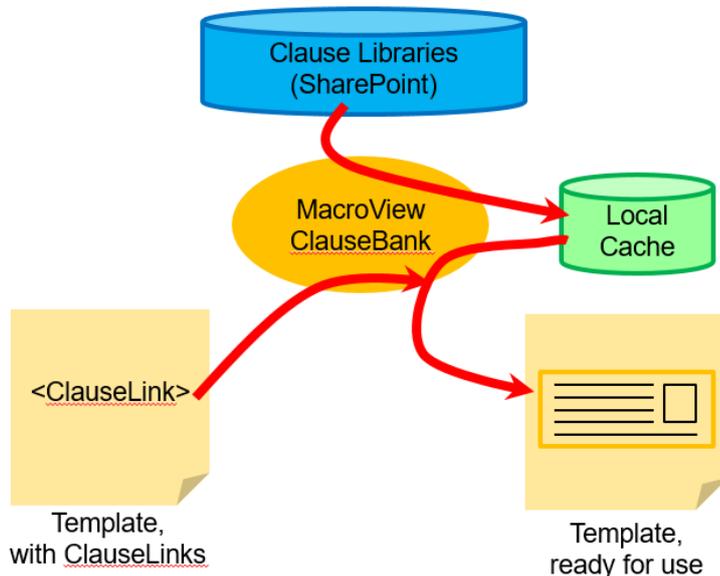
The web-based nature of SharePoint dployment is much easier than with alternative approaches such as Autotext templates. For a rapid implementation for MacroView ClauseBank you simply create a document library in SharePoint Online and load some clause documents to it. You can use Folders to categorise the content items in a way that makes sense to your users.

Supports both Office 365 **SharePoint Online and on-Premises SharePoint** Server.

Assists with Maintaining High-Quality Presentation

As it retrieves content items from SharePoint and inserts them in Word documents and Outlook messages MacroView ClauseBank maintains styles – right down to character-level styles. Content inserted by ClauseBank can comply with strict formatting and presentation standards, including multi-level paragraph numbering, without requiring specialist skills from business users.

Simplifies Management of Office Templates

You can insert ClauseLinks in your templates so that an up-to-date version of sections of the template is retrieved from the central ClauseBank when creating a document based on that template.

This can dramatically reduce the effort required to maintain your templates – key sections such as forms and other **common content are maintained only once,** and not once per template.

Storing content in ClauseBank can also **reduce the number of templates that you need to deploy and maintain.**

The diagram on the left illustrates MacroView ClauseBank expanding a ClauseLink in a template. The expanded template is then ready to be used to generate a document. This expansion can occur when the user is fully offline (i.e. not connected to SharePoint).

Offline Operation

The Offline Replication feature of MacroView ClauseBank is great news for users who have unreliable or slow connections to the central ClauseBank. Content items stored on a central server (e.g. on Microsoft Office / SharePoint Online or on an on-premises SharePoint Server in another office) are replicated down to the user's C: drive in the background, when connectivity is available. Clause items can then be previewed and retrieved at local speed – **performance is not impacted by a slow internet connection**.

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For more information visit:
www.macroview365.com
www.youtube.com/macroviewvideo

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