MacroView

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.

Make SharePoint Feel as Familiar as a Windows File Share or Outlook Folders

MacroView DMF overcomes the frustrations that users find when they attempt to use out of box SharePoint to manage their documents and emails. DMF extends and enhances the integration between SharePoint and Microsoft Outlook, Word, Excel, PowerPoint, Adobe Reader / Adobe Acrobat and Windows itself so that managing documents and emails in SharePoint works the way business users expect.

SharePoint Online

SharePoint

MacroView DMF Hybrid

MacroView DMF supports both SharePoint Online and on-premises SharePoint Server (2010 or later). You can have multiple on-premises SharePoint web applications and / or an Office 365 SharePoint Online tenant – i.e. a hybrid document and email store.

MacroView DMF 365

MacroView DMF 365 supports Office 365 SharePoint Online. As with MacroView DMF Hybrid, MacroView DMF 365 automatically discovers and displays all the areas for which you have access permission. You do not have to register sites or site collections manually.

Browse mode enables efficient navigation of very large email and document stores.

Recent and **Favorites** enable quick access to frequently or recently used documents, locations and searches.

Search for documents in SharePoint using metadata and / or content while you work in familiar applications.

Displays **Views** as defined in SharePoint and supports filtering and sorting.

OneDrive for Business (personal) sites, Public & Private Group sites.

Automatic discovery and accurate tree-view display of all areas for which you have permission.

Windows-style file list with rich right-click menu.

Color highlighting of files in special states – e.g. Checked Out.

Formatted **previews** of documents and emails stored in SharePoint.

"Convenient SharePoint folder, files and contents view direct from within Outlook.
Very easy to attach documents from SharePoint folders.
Makes SharePoint very accessible direct from Outlook."

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.
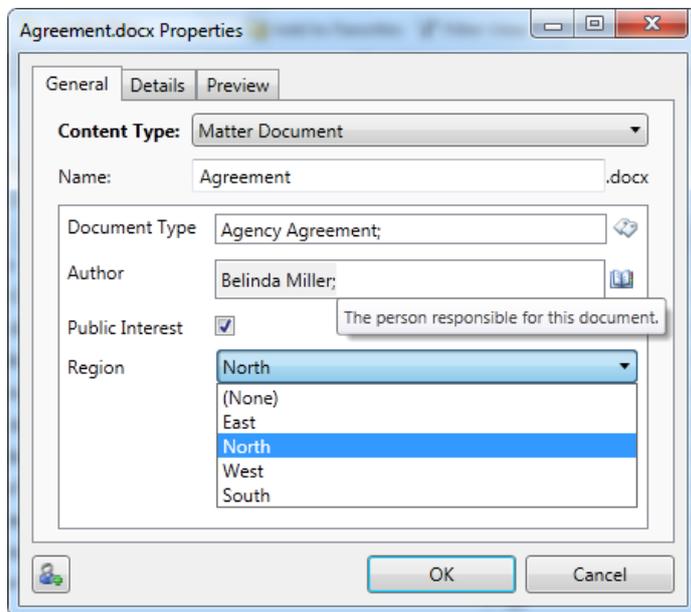

- Supports all SharePoint field types including Person/Group and External Data.

- 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 Search (both Online and on-premises) 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 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 Search indexes – no additional indexes or crawls required.
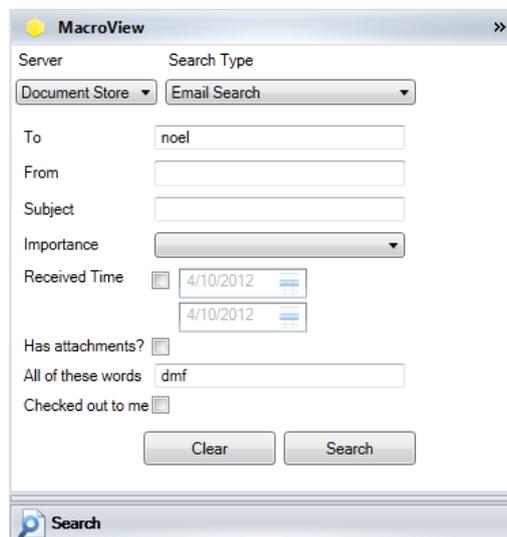
Save PDFs direct from Adobe Reader and Acrobat

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 discovers and displays all areas of SharePoint for which you have permission.

■ 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, Document Sets & 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.

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.

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.

■ Bulk saves performed in the Background.

■ Visible indicator that an email has been filed.

■ Rule-based filing of sent and received emails.

MacroView Predictive Email Filing (optional module) - suggests filing locations for emails and auto-files sent and received emails based on Filing (Luggage) tags.
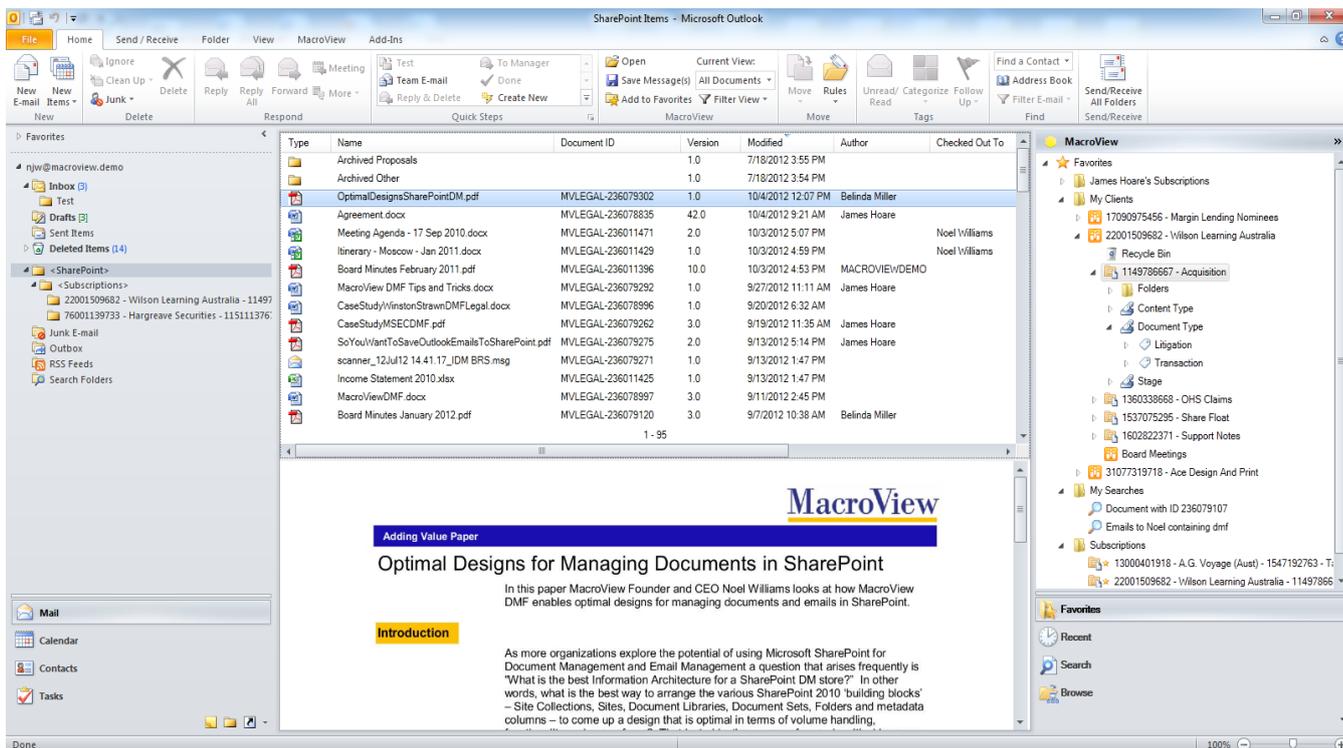
Uploading, Downloading, Moving and Copying Documents

■ **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, with option to supply metadata once rather than for each file.

■ **Download** one or multiple documents by drag and drop or right-click, *Download*.

■ M**ove** one or multiple documents from one library to another, even if the destination library is located in a different Site Collection, Web Application or 365 Tenant. Existing version history is retained and existing metadata reused (great for moving documents between extranets and an in-house document store).

■ **Copying** documents is also intuitive with DMF.

Good Performance, even with the Largest SharePoint Environments

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.

Advanced Document Management Features

MacroView DMF can automatically check 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, viewing Audit history, and convenient access to Compliance features such as record declaration and legal holds.

*"MacroView DMF is architected to be extensible and customisable."*

Customizable and Extensible

Includes relabelling of commands and menu items; custom right-click menu items, search panels and profiling (metadata capture).

Offline Support

If you have the OneDrive for Business client installed, the right-click menu of MacroView DMF will contain a *Create a Synchronized Copy.* Item, which streamlines collaboration by offline users.

Advanced Office Integration (AOI)

Save As
◉ Save As New Version
◯ Save As New Document
◯ Overwrite Existing Version
[OK] [Cancel]
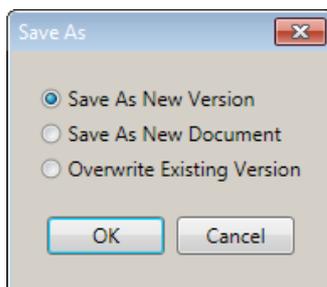
Optional DMF module that provides intuitive Version Control options as you close a document, including overwrite of a Major version (Majors only libraries).

Prevents accidental discard of changes.

Works even if document is not checked out.

Enhanced Document Level Security (EDS)

Optional DMF module that streamlines the setting of document-level permissions, even by *Contribute* level users. Check a *Private* box to make a document 'My Eyes Only' and assign specific access to selected other users and groups. (On-premises implementations only).

Unique Document Numbering (UDN)

Optional DMF module that enhance and extends native SharePoint unique document numbering:

- Documents numbered sequentially across a whole Web Application rather than within each Collection, and control over formatting. (On-premises implementations only).

- Automatic update of footers of Word documents to display Document ID, current version number and other Document Reference information. (SP Online and on-premises).

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 fully respects the SharePoint security model and 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 or apps on mobile devices.

Streamlined Deployment and Support for SharePoint and Microsoft Office Versions

The MacroView DMF tree-view can display the Site Collection / Site / Library / Document Set / Folder structure of SharePoint Online, SharePoint 2016, 2013 and 2010 and SharePoint Foundation. Hybrid solutions with SP Online tenants and one or more on-premises web applications are supported.

MacroView DMF server-side components are installed by a supplied WSP and enable full functionality and volume handling.

On client PCs, MacroView DMF will run in Office 2010 and later. This means that you can stage your deployment of Office upgrades – some seats can run Office 2016 while others are running earlier versions of Office.

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 ADMX template

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