

MacroView Message

Want to replace your existing Outlook folders with Microsoft SharePoint? MacroView Message makes managing emails in SharePoint feel as familiar as using folders in Outlook, while at the same time harnessing the power of SharePoint to enable powerful searching and navigation of large email and document stores. By providing an excellent user experience in Outlook MacroView Message significantly improves user adoption of SharePoint.

Work with SharePoint as Easily as With Folders in Outlook



MacroView Message adds a new pane to your Outlook environment that makes saving, viewing and retrieving emails and attachments in SharePoint as easy and familiar as using Outlook folders. You can interact with your SharePoint document store in four ways – Browse, Search, Recents and Favorites.

MacroView Message Hybrid

MacroView Message Hybrid supports both SharePoint Online and on-premises SharePoint Server (2010, 2013, 2016). You can have multiple on-premises SharePoint Servers and / or an Office 365 SharePoint Online tenancy – i.e. a hybrid email and document store.

MacroView Message 365

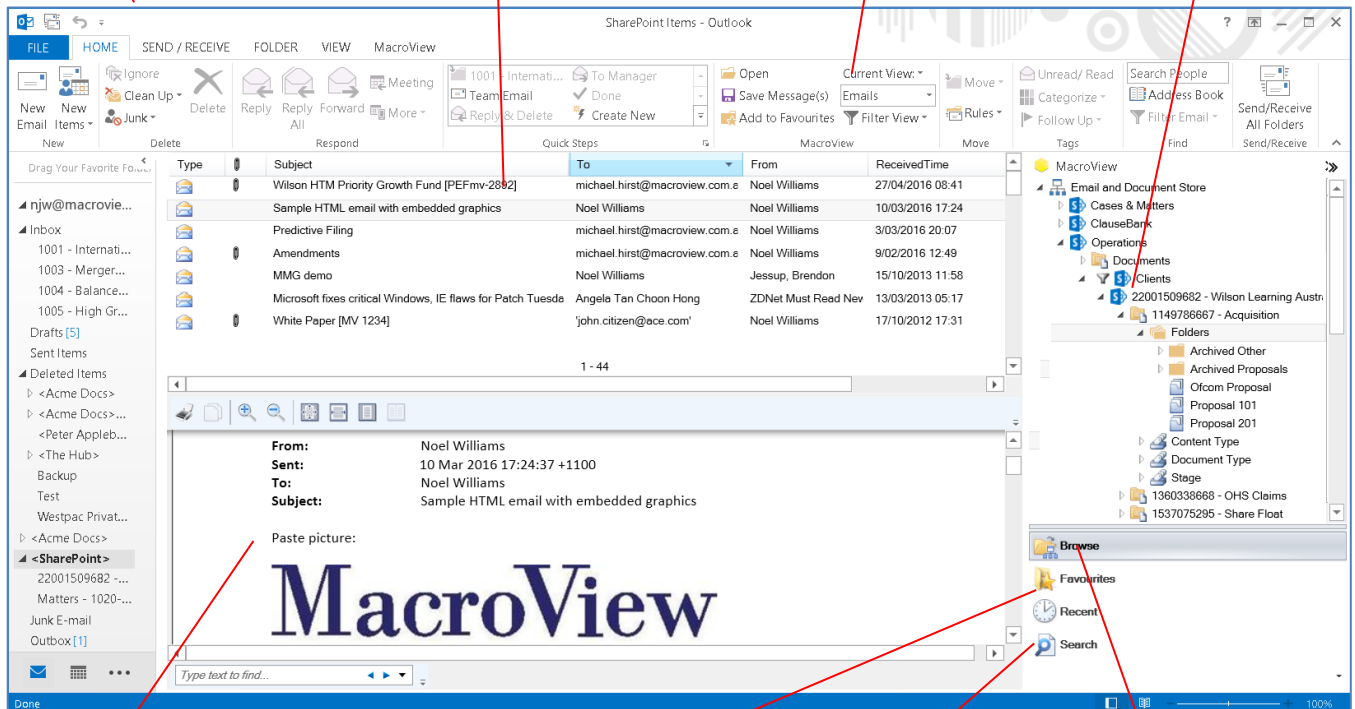
MacroView Message 365 supports Office 365 SharePoint Online. As with MacroView Message Hybrid, MacroView Message 365 automatically discovers and displays all the areas for which you have access permission. You do not have to register sites or site collections manually.

Intuitive access to SharePoint directly from Outlook 2016, 2013 and 2010.

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

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

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



Formatted previews of documents and emails stored in SharePoint.

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 Outlook.

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

“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**

Drag and Drop Saving of Emails and Attachments

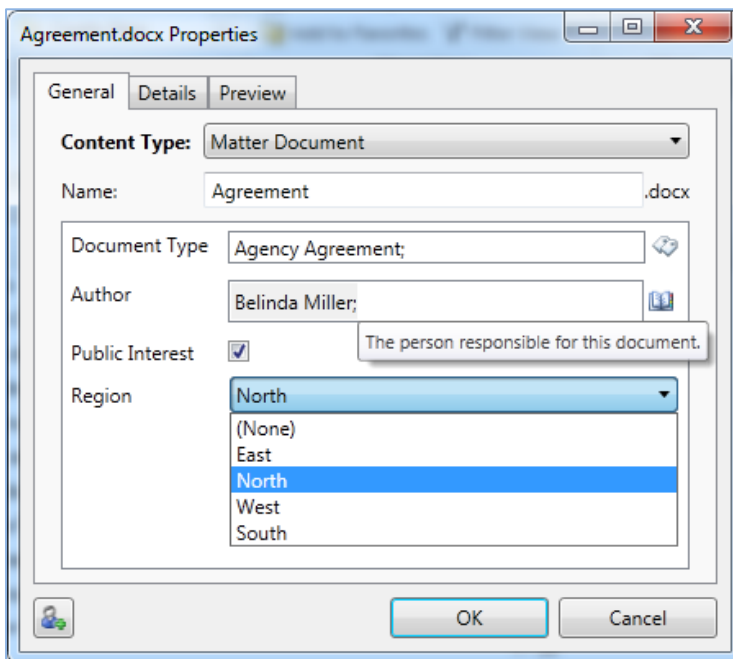
With MacroView Message you can drag and drop to the MacroView pane to save an email – or multiple emails, which means that you can save to any SharePoint document library, document set or folder for which you have appropriate permission. It is as easy as saving to a private or public folder in Outlook.



- You can also drag and drop to save one or multiple attachments, or to upload one or multiple files from a Windows folder. The saving of emails and attachments is performed in the background - you can so on working in Outlook while the save proceeds.
- MacroView Message provides options to have incoming attachments saved as part of the stored message or split off and saved as separate files in SharePoint, with the message body also in a separate file.
- You can rename an attachment as you save it to SharePoint – e.g. so that an incoming attachment is stored as the latest version of an existing file with a different name.
- Characters that are illegal in SharePoint file names are automatically removed and recorded as metadata.
- You can drag and drop to save to your favorite areas in SharePoint. The Push Favorites mechanism of MacroView Message can create Favorites automatically for a user, including Favorites areas for that user’s colleagues.

Automatic Capture of Email Metadata

As it saves an email to SharePoint, MacroView Message will automatically select an *Email* content type and record all the non-personal attributes of the email in corresponding metadata columns – e.g. *To*, *From*, *SentOn* date/time, *Subject*, *Attachment Count*, etc. In this way MacroView Message can eliminate prompting for metadata as a user saves an email, which significantly **improves user adoption** because saving an email to SharePoint is then as easy as saving it to an Outlook folder.

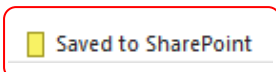


MacroView Message profiling (metadata capture) dialog for an attachment.

- MacroView Message supports all SharePoint column types – including *Managed Metadata* and *External Data* (BCS columns).
- MacroView Message ships with a site content type that contains all the metadata columns that it can record automatically. Alternatively the product can be custom configured to record in your existing metadata columns.
- As it saves emails and attachments MacroView Message will prompt for any custom metadata columns that it cannot record automatically.
- If you are saving multiple emails or attachments, MacroView Message lets you capture common metadata and have it recorded for all the files, rather than prompt you separately for each file.
- As you save attachments, or load files from Windows folders, file system attributes (such as *Created Date*, *Last Modified Date* and *Author*) can be recorded automatically.

Prevents Duplicate Copies of Emails

- MacroView Message automatically prevents duplicate copies of an email in any one area of SharePoint, regardless of how many recipients attempt to save the email to that area. It does this by using a special naming convention for the MSG file that it creates to store the email.
- Emails that have been saved are flagged with a yellow *Saved to SharePoint* category. Alternatively MacroView Message can be configured to automatically delete the email from its Outlook folder once it has been saved to SharePoint. The email in the *Deleted Items* folder will have its *Saved to SharePoint* flag set.



“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.”

Automatic Filing of Emails

- As you send an email in Outlook MacroView Message can be configured so that you are prompted to save a copy of the outgoing email in a SharePoint area of your choice.
- A MacroView Message user can define MacroView Filing Rules that apply for both Received and Sent emails. These rules are similar in operation to Outlook’s own rules. They specify the area in SharePoint where an incoming email or a copy of an outgoing email should be saved.
- MacroView Predictive Email Filing** is an optional module that is available for MacroView Message. Incoming and outgoing emails are automatically saved to the location indicated by a special filing tag in the Subject of the emails. MacroView Predictive Email Filing can also suggest filing locations for emails that do not contain a filing tag. These suggestions are based on where other emails from the same Sender to the same Recipient have previously been filed.

Convenient, Intuitive Searching for Emails and Documents

MacroView Message lets you perform powerful searches for emails and documents in SharePoint without needing to leave Outlook. This is another key reason why MacroView Message **enhances user adoption** when SharePoint is introduced as the new way of managing emails and their attachments.



- Find emails and documents in SharePoint, based on their content and / or their metadata – e.g. emails where the Received date is in a specified range and the body of the email or its attachments contain particular words.
- You can click to see a formatted preview of a search result and double-click to retrieve the result and open it in its application – e.g. PDF results open in Adobe Reader / Acrobat.
- Search panels also support Refiners.
- You can also save your searches as Favorites so that they can easily be re-executed.
- MacroView Message sends queries to and displays search results from the SharePoint Search Engine - you do not need to create additional search indexes.
- Search for documents in Windows file shares and emails in Exchange by having SharePoint index these existing stores.
- By editing a centrally stored XML definition file an administrator can readily customise and extend the search panels that ship with MacroView Message, e.g. to reflect the way metadata is used in your organization.

Type	Subject	To	From	Received Time	Url
	Wilson & Strawn Trust #1	Noel Williams	Michael Hirst	30/07/2013	
	EMDG Newsletter - October 2013	Noel Williams	Austrade	15/10/2013	
	Owner Insight: TripAdvisor booking request	Noel Williams	Holiday Lettings	14/10/2013	
	SharePoint Consultant / Developer	Noel Williams	Lenka Ferencikova	10/09/2014	
	SharePoint Consultant / Developer	Noel Williams	Lenka Ferencikova	10/09/2014	
	MacroView Evaluation For Drago Solutions	Ignacio López Ordóñez;	MacroView Support	10/08/2010	
	Wilson & Strawn Trust #1	Noel Williams	Michael Hirst	30/07/2013	
	MMG demo	Noel Williams	Jessup, Brendon	15/10/2013	

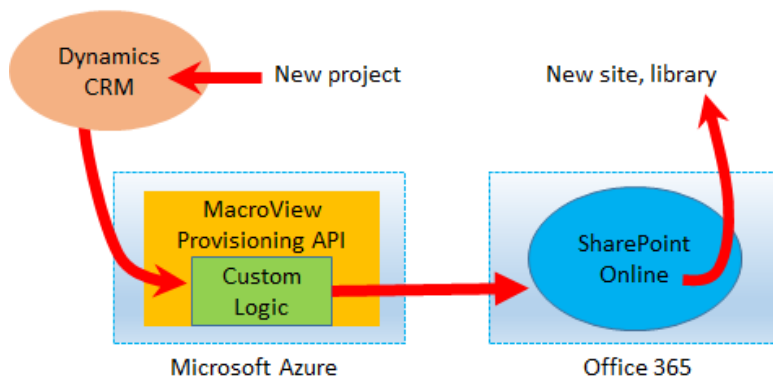
Email Search panel of MacroView Message - note formatted preview of search result and right-click menu.

Efficient Operation with Large SharePoint Document Stores

Other email 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. Unfortunately this tends to cause the Mail Folders pane to fail as the SharePoint environment gets large. The purpose built tree-view pane added by MacroView Message avoids this issue, which is why numerous organizations make the move to MacroView Message to cope with their growing SharePoint environments.

- **Favorites** provide one-click access to areas that you work with frequently. You can add your own Favorites and Favorites can also be automatically pushed out to you – e.g. so you can share your Colleagues' Favorites.
- **Search Site Tree** uses SharePoint to perform an indexed search so that you can quickly locate to a particular area in SharePoint – even if it is deeply nested.
- Right-click on a search result (see above) and be navigated to the SharePoint area where the search result is located - an easy way to see related documents and emails.
- MacroView Message is designed to maximize responsiveness & minimize waste of bandwidth as you navigate. It does this by automatic filtering supported by **smart caching** - both client-side and server-side*. (*on-premises MacroView Message Hybrid only)

Configuration, Deployment and Provisioning



- Client-side components are installed by using an Active Directory MSI.
- MacroView Message has extensive configuration settings, all of which are compatible with Group Policy. An ADMX template and accompanying documentation are available for download.
- A provisioning API is available to facilitate integration with line-of-business systems – e.g. to automatically provision a site and document library in SharePoint as a new project is recorded in a CRM system.

Offline Support

- When you are offline in Outlook or working in Outlook Web Access you are still able to drag and drop emails and attachments to the Outlook Folders that correspond to your Favorite document libraries, document sets and folders in SharePoint. You can also use Outlook Rules to automatically save copies of incoming & outgoing emails to those folders.
- If OneDrive for Business is installed the right-click menu for a document library will contain a *Create a synchronised copy* item. This streamlines the creation / synchronization of a Workspace or OneDrive for Business Library so that multiple users (including those working offline) can collaborate on emails and their associated attachment files.

Migration and Bulk-Update of Existing Emails

Need to migrate a large number of emails to SharePoint – e.g. from Public Folders? Or do you already have a large volume of emails stored in SharePoint?

MacroView STANDARDISER

MacroView can supply the Standardiser utility, which streamlines the updating of existing email files so that they have the same format, naming and other metadata treatment as emails that you save with MacroView Message.

MacroView Standardiser also updates existing document libraries so that they have the metadata columns that MacroView Message can set automatically, as well as standard views.

MacroView Standardiser enables efficient bulk migration of emails to SharePoint and is also an ideal tool for organizations updating to MacroView Message from another SharePoint-based email management add-on.