

MacroView Predictive Email Filing

MacroView Predictive Email Filing is an optional module available for MacroView DMF and related products such as MacroView Message and MacroView Case and Matter.

MacroView Predictive Email Filing further streamlines the saving from Outlook to SharePoint of both received and sent emails by using tracking / luggage tags to automatically identify the save location and by suggesting appropriate save locations for emails that do not already have a tracking / luggage tag.

Tracking / Luggage Tags Automate the Saving of Emails

If MacroView Predictive Email Filing is active, MacroView DMF will detect the presence of special tracking tags (also known as luggage tags) in the Subject of incoming or outgoing emails. MacroView DMF will then save the email to the location identified by the tag.

The tracking tag can be allocated by the organization – e.g. Client ID, Matter number, Project code, Policy number – these are known as User-Defined Tags. Right-clicking in the MacroView tree and choosing *New Email* creates a new email with the relevant User Defined tracking tag already inserted in its Subject.

Alternatively, the tracking / luggage tags can be automatically generated and recorded on saved emails by MacroView PEF. These system-allocated tags have a prefix that identifies your organization.

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.

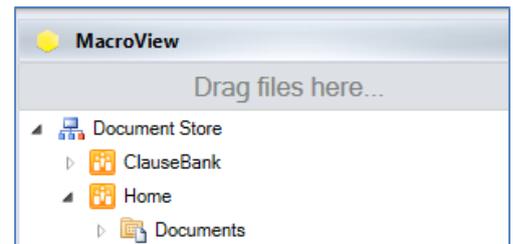
A Drop Zone to Make Drag and Drop Even Easier



MacroView DMF and related products provide excellent support for drag-and-drop. You can drag-and-drop to a location in the Browse or Favorites mode to save emails and attachments to that area in SharePoint.

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 PEF will save the email to the location in SharePoint that is identified by a Tracking Tag that it finds in the Subject of the email.

Saving by drag and drop just got even easier!



Automatic Filing of Incoming Emails

MacroView checks emails as they arrive in your InBox to see if their Subject contains a valid Tracking Tag. The Tag identifies a destination area in SharePoint where the email should be saved.

MacroView PEF realizes that it would be highly disruptive if the user were prompted to supply metadata immediately as emails arrive in their InBox. If MacroView PEF finds that the destination area is defined so that the user needs to be prompted for one or more metadata attributes, MacroView PEF defers the saving and prompting until a time that is convenient for the user. The newly-arrived email is marked with a *Not Auto-filed* flag. When convenient, the user can save the email by dragging and dropping it to the Drop Zone. The email is then marked *Saved to SharePoint* or deleted from the InBox, as appropriate.

If all the metadata defined for that destination area can be recorded automatically (i.e. no need to prompt the user for any metadata) a copy of the incoming email will be saved to the SharePoint location identified by the Tracking Tag. The original email in your InBox will be marked as *Saved to SharePoint*. The email will not be deleted from your InBox – otherwise you may not be aware that it has arrived. This combination of zero-profiling design and Fully Automatic PEF can really **improve user productivity**.

Automatic Filing of Outgoing Emails

If an sent email has a valid Tracking Tag in its Subject, MacroView PEF will display a *Save to SharePoint* dialog, already located on the area in SharePoint identified by the Tracking Tag. The user can complete the save to that area by simply clicking OK. Alternatively the user can navigate to a different location and save the email there, or choose to not to save a copy of the sent email to SharePoint.

Suggested Saving Locations

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

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 displayed first.

Clicking the *Show suggested locations* button will display a list of relevant save locations. The first suggestion will be the location identified by a 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.

The screenshot shows the 'Save to SharePoint' dialog box. A yellow banner at the top indicates 'A predefined save location has not been set' and provides a 'Show suggested locations' button. The 'Suggested Locations' window is open, displaying a list of locations. The first location is selected. Below the list are 'Show Location', 'Save', and 'Cancel' buttons. Three red callout boxes provide instructions:

- Navigates the Macro View 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.

Unless User Defined Tags are configured, a system allocated tracking tag will automatically be inserted in the Subject of the email saved in SharePoint, and also in any copy of the email left in your *InBox* or *Sent Items*. This Tracking Tag can dramatically speed up the saving of subsequent emails in the same conversation - by default to the same area where the first email was saved.

Technical Requirements:

Requires MacroView DMF / MacroView Message v7.8 or later; Microsoft Outlook 2013 or later.
Requires Microsoft SharePoint Server 2013 or later.
Supports saving to Office 365 SharePoint Online provided that a SharePoint on-premises server is available.