

MacroView enables solutions based on Office 365 SharePoint Online that provide comprehensive functionality and an excellent user experience for generating and managing documents and emails. MacroView also makes it easy to create hybrid DM solutions that use both SharePoint Online & SharePoint On-premises.

Managing Documents and Emails in Office 365 / SharePoint Online

MacroView DMF 365 and MacroView Message 365 do not change how SharePoint Online stores documents & emails – what they do is **dramatically improve the user experience** as you save, search for and manage emails & documents stored in SharePoint Online. The result is a much higher level of **user satisfaction & user adoption** when SharePoint Online replaces Windows file shares and Outlook folders.

Makes SharePoint Online Feel Familiar, Not Frustrating

MacroView DMF and MacroView Message makes working with a SharePoint Online document store feel familiar and intuitive for users working in Microsoft Outlook. MacroView DMF provides the same familiar, intuitive experience in Microsoft Word, Excel, PowerPoint, Adobe Reader / Acrobat and Windows itself.



- Complete, accurate tree-view display of the areas of your SharePoint Online tenancy for which you have access permission.
- Right-click menu provides a full range of features for working with documents & emails such as opening, sending as attachments, etc.
- Drag & drop to save emails to SharePoint Online, with automatic capture of metadata and prevention of duplicates.
- Drag and drop to save one or multiple email attachments or documents from any Windows folder to SharePoint Online.
- Characters that are illegal in SharePoint file names are automatically removed, so that the user does not receive an error message.
- Consistent, user friendly capture of metadata, including when saving / uploading multiple emails or documents.

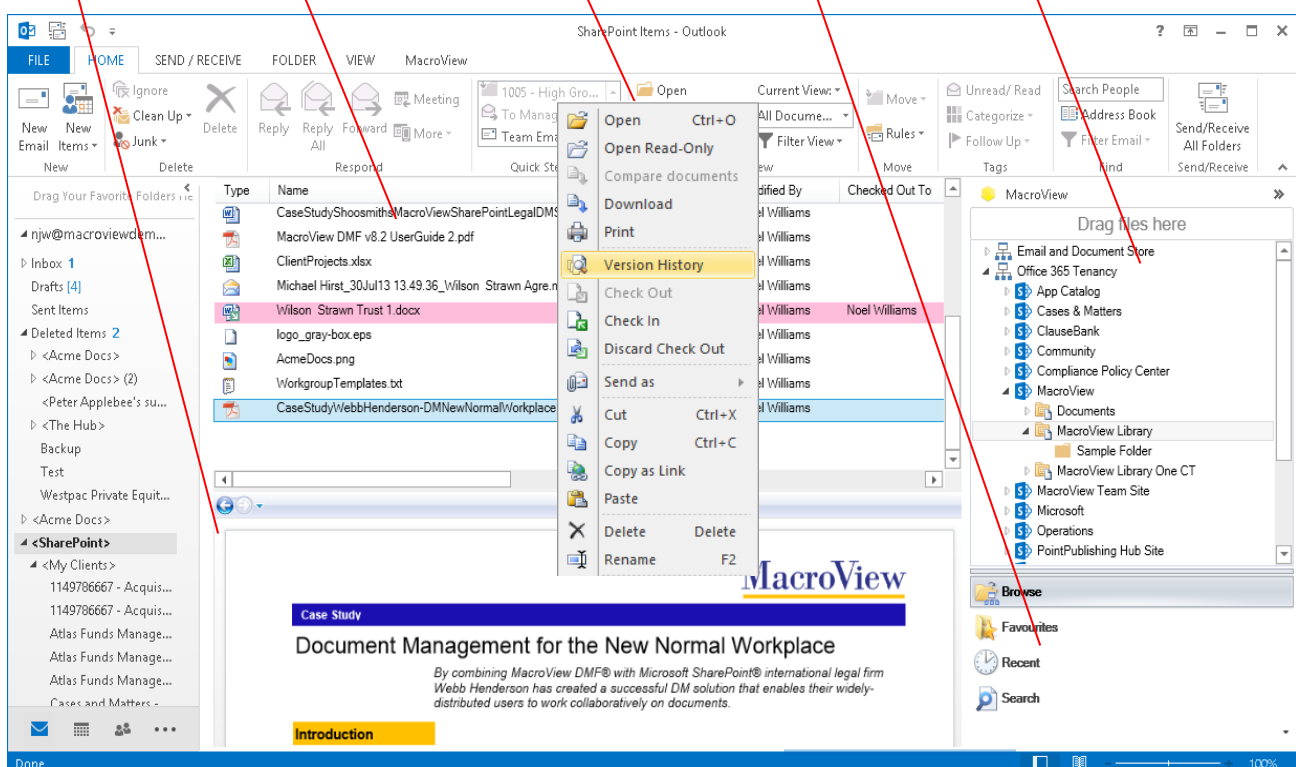
Formatted **previews** of documents and emails.

Click on an area in SharePoint Online to see its documents & emails.

Windows-style right-click menu.

User-friendly navigation & search.

Familiar tree-view display of the structure of document store in SharePoint Online.



MacroView pane lets you save, retrieve and manage documents and emails stored in SharePoint Online directly from Outlook.

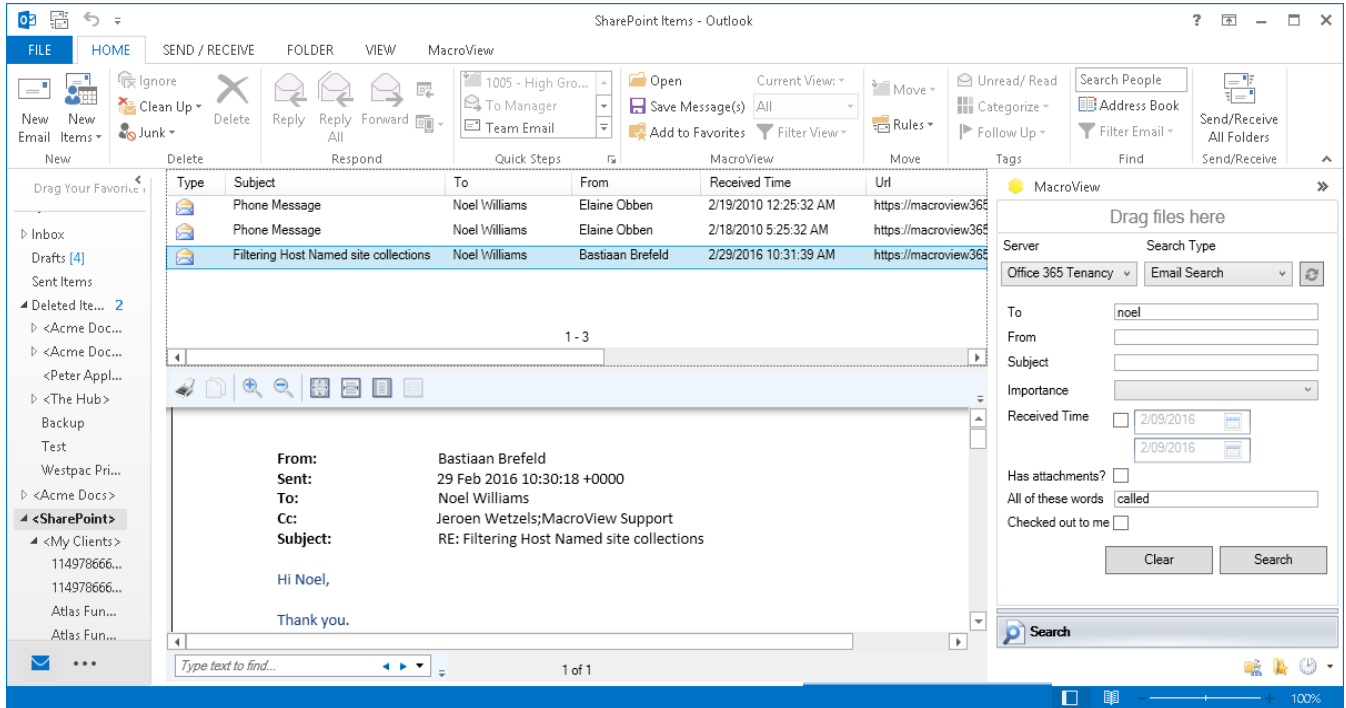
“With MacroView DMF and SharePoint, we have been able to deliver a first-rate document management solution to our team. The functionality and flexibility of the solution, along with its ability to support collaborative working from virtually anywhere, are the big drawcards”.
Ara Maroossian, Partner, Webb Henderson

Data Sheet

Managing Documents and Emails in Office 365 / SharePoint Online (continued)

Intuitive, convenient searching for documents and emails

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 DMF 365 / Message 365 provides an intuitive search interface, which is powered by the SharePoint search engine.



Email Search panel in Microsoft Outlook - convenient searching for emails in SharePoint Online, based on content AND metadata.

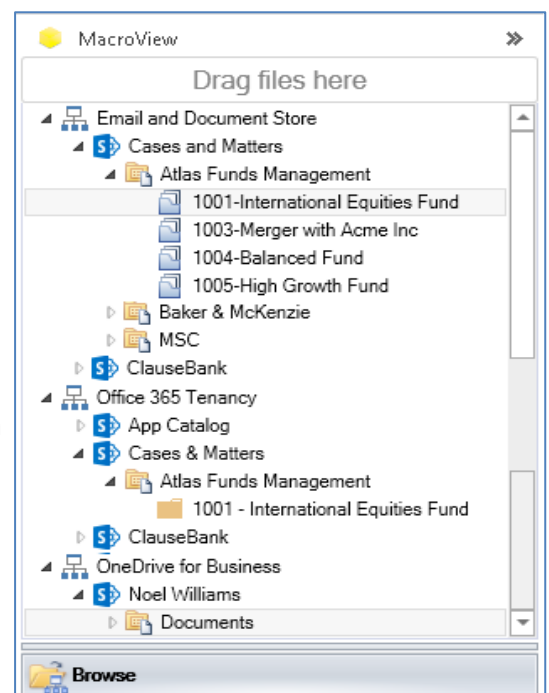
One Drive for Business and Hybrid DM Solutions



MacroView DMF 365 and **MacroView Message 365** provide excellent support for managing documents and emails in One Drive for Business. For added convenience, One Drive for Business personal sites are shown separately in the MacroView tree display.

Hybrid DM solutions that utilize both SharePoint Online / One Drive for Business and on-Premises SharePoint Servers are increasingly popular with many organizations. **MacroView DMF** and **MacroView Message** are an excellent way to implement such hybrid DM solutions.

- The MacroView tree can display one or multiple on-Premises SharePoint web applications, as well as SharePoint Online and One Drive for Business areas.
- Drag and drop to move or copy documents & emails between on-Premises and Online, with metadata preserved as appropriate.
- Hybrid Search results available if using SharePoint Server 2016 on-premises.



“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/>)

"MacroView has delivered the functionality to bridge the gap between native SharePoint DMS functionality and what is required in a legal environment." Shane Scott, IS Director, Shoosmiths

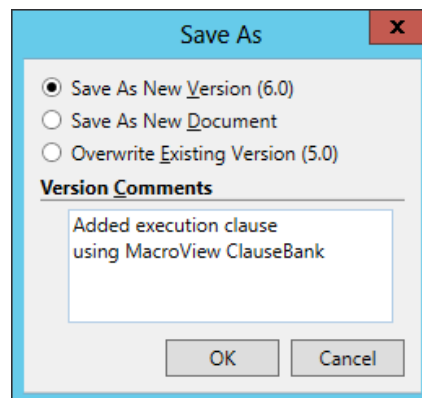
DM Solution for Legal Departments, Law Firms and Other Case-based Organizations

MacroView Case & Matter 365 is the DM solution that your Legal Department has been looking for!

It uses an Office 365 / SharePoint Online tenancy to store documents and emails for cases and matters, and provides the DM functionality and user experience that legal users expect, based on their experience with traditional DM systems. MacroView Case & Matter is also relevant to small law firms, compliance departments and to any organization where activity is organized on a case-by-case basis.

Check Out, Check In and Version Control

MacroView Case & Matter 365 simplifies native SharePoint check-out / check-in and provides the advanced version control features that experienced DM users expect as they close and save a document to SharePoint Online.



Unique Document Numbering

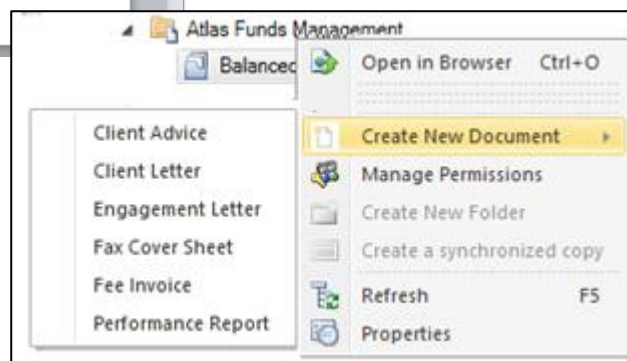
MacroView Case & Matter 365 automatically displays unique Document ID, Version Number and other document reference metadata in the footers of documents as they are saved to and opened from SharePoint Online.

¹ "Growing SharePoint from small libraries to large scale repositories and massive archives"; Adam Harmetz, Microsoft Corporation; Presentation to Microsoft SharePoint Conference, 19-22 October 2009. MVLEGAL-236079037/0.2

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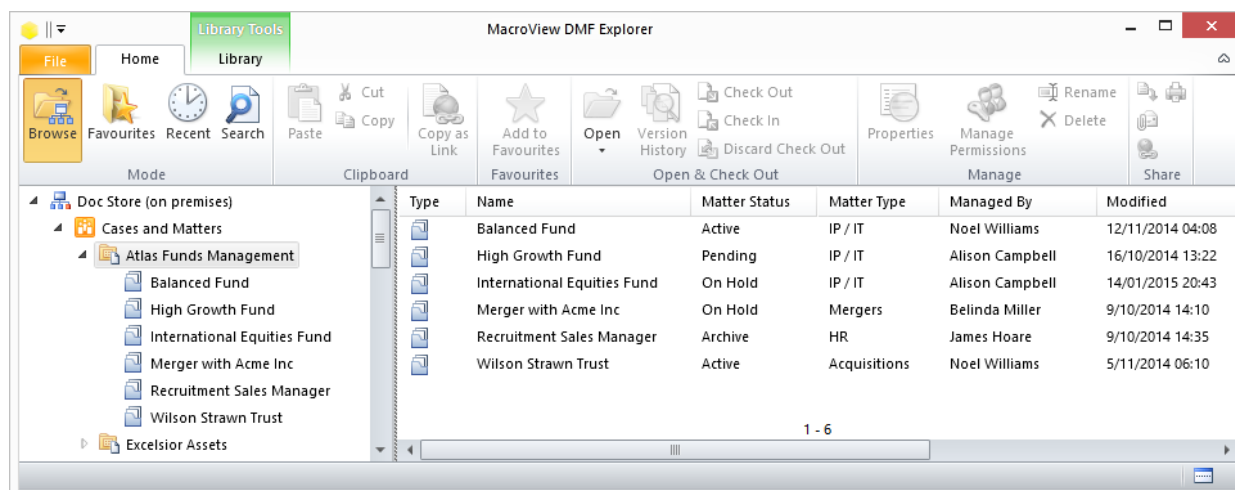
Document Generation

MacroView Case & Matter 365 provides convenient, right-click access to available Microsoft Office templates for generating documents. Generated documents are saved in the SharePoint Online area which the user right-clicked and metadata captured automatically.



Case and Matter Management

With MacroView Case & Matter 365 a user who can save a document can right-click to create the area in SharePoint Online for a new case or matter. Metadata for a new case / matter is automatically applied to its documents & emails. MacroView Case & Matter makes it easy to find the case / matter that you want to work with, and to view its documents and emails. You can right-click to Archive a case / matter.



MacroView Case & Matter 365 helps you manage cases and matters, as well as their documents and emails.

"Implementing MacroView ClauseBank on Office 365 / SharePoint Online is simple – in a few hours you can create an ECM solution that really improves both the productivity and the quality of document generation."

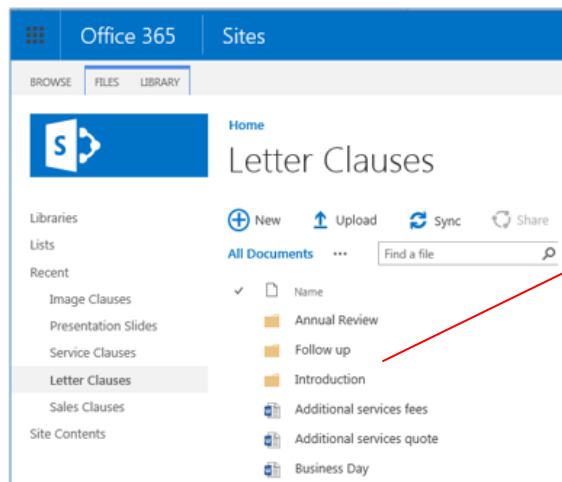
MacroView ClauseBank customer

Faster, Safer Document Generation with Office 365 / SharePoint Online

MacroView ClauseBank is the best thing that's happened to document automation in a long time!

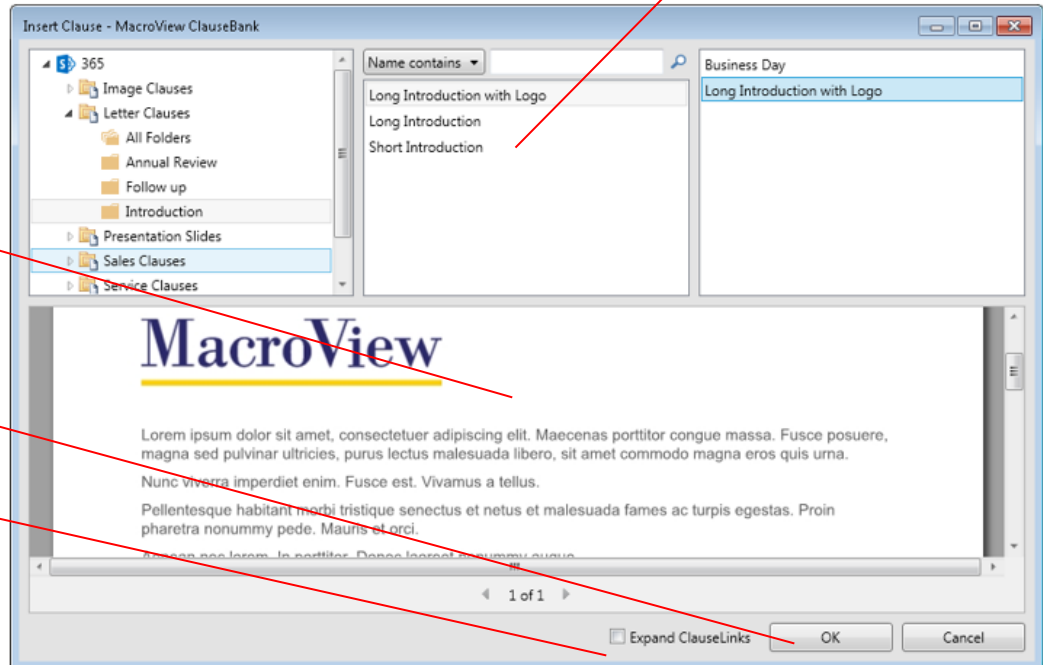
MacroView ClauseBank lets you generate Word documents, Outlook emails & PowerPoint presentations more quickly and with less risk of incorrect content or formatting. As you work in Microsoft Word, Outlook or PowerPoint, MacroView ClauseBank makes it easy to find and re-use standard, approved content stored in your organization's Office 365 / SharePoint Online tenancy.

The re-usable content items ('clauses') are mini-documents saved in document libraries in SharePoint Online. You can use folders to structure the content in way that makes sense to your users. Thanks to SharePoint Online, the standard, approved content is available to users wherever they are located.



Mini-documents saved in a folder tree in a SharePoint Online document library.

...results in an attractive menu of available content items in Word, Outlook or PowerPoint.



Formatted **preview** of selected content item.

Insert selected items at the current cursor position, with styles and formatting retained.

Clause-links can dramatically reduce the effort required for maintaining Office templates.

- Adding new content items to keep the central content bank up-to-date is easy - select text in Word, right-click and choose *New Clause*.
- Retained styles and formatting helps to ensure that generated documents **comply with corporate branding standards**.

- MacroView ClauseBank is **great for distributed organizations** – content published in a central content bank can be cached locally, so that previewing and retrieving content items is fast, even when the user's internet connection is slow.