MacroView

SharePoint Email Management

Use these feature checklists to guide and structure your evaluation of available products for SharePoint-based email management. They show the features that are available in various MacroView products and allow you to record the capabilities of other products in a convenient summary form.

Topics

Click the topic to jump to the relevant feature checklist:

13.0

Microsoft Partner
Gold Application Development

Enabling best practice solutions for generating
and managing documents and emails using
Microsoft Office, SharePoint and Office 365

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Viewing and navigating a SharePoint email and document store

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Automatically discover and display all Site Collections for which the user has permission (i.e. user does not need to register each site collection separately).	Y	Y	Y[1]	Y[1]	
Accurate display of tree of sites, sub-sites, document libraries, document sets and folders.	Y	Y	Y	Y	
Read-only areas distinguishable from areas where the user has Read / Write permission.	Y	Y	Y	Y	
Furniture nodes[2] suppressed.	Y	Y	Y	Y	
Easy to drill down to a particular Site Collection.	Y	Y	Y	Y	
Easy to drill down to a sub-node (e.g. sub-site / document library within a site, document set / folder in a library, sub-folder in a folder).	Y	Y	Y	Y	
Metadata Navigation (as defined in SharePoint).	Y	Y	Y	Y	
Efficient navigation to a particular area of the document store using an indexed search (so that navigation is still fast in a large document store).	Y	Y	Y	Y	
Quick access to recently used areas of the document store.	Y	Y	Y	Y	
Click a search result to navigate to the area where the document / email is stored.	Y	Y	Y	Y	
Quick access to favorite / frequently used parts of the document store.	Y	Y	Y	Y	
User can add a frequently used area of the document store as a Favorite.	Y	Y	Y	Y	
Favorites can be created automatically (pushed) to individual users or groups of users.	Y	Y	N	N	
User alerted to the need to refresh their display of a node (e.g. a site) because it contains new sub-nodes (e.g. sub-sites or document libraries) created by another user.	Y	Y	N	N	

1. If the MacroView DMF full trust web service is deployed (which is normally the case in SharePoint On-premises implementations) the MacroView tree view will contain all areas that contain content for which the user has permission, even if those areas are nested below one or more breaks in permission inheritance. In SharePoint Online implementations the tree-view display stops at the first break in permission inheritance.

2. 'Furniture nodes' are document libraries that must be present in a SharePoint implementation but which should not be used to store documents and emails. Examples are *Pages, Images, Site Collection Pages, Site Collection Images, Style Library, Site Assets*, etc. The display of such nodes can be suppressed using the *Document Libraries to Ignore* setting. In an On-Premises implementation the *Site Collections to Ignore* setting can be used to suppress the display of certain site collections.

Working with emails and documents stored in SharePoint

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
All Views of a library (as defined in SharePoint).	Y	Y	Y	Y	
Paged display of file list (for optimal use of bandwidth when large number of files).	Y	Y	Y	Y	
Sort a displayed view by clicking a column heading (toggling Descending / Ascending order).	Y	Y	Y	Y	
Formatted previews of documents and emails stored in SharePoint (Online and On-Premises).	Y	Y	Y	Y	
Filter a view using values in a metadata column.	Y	Y	Y	Y	
Highlighting of files in special state (e.g. Checked Out, On Legal Hold, Declared as a Record).	Y[1]	Y[1]	Y[1]	Y[1]	
Right-click, *Print* to print a document or email.	Y	Y	Y	Y	
Key Filters (as defined in SharePoint).	Y	Y	Y	Y	
Quick access to recently opened / modified files.	Y	Y	Y	Y	
'Sticky' Views – record and display most-recently used view for each application (e.g. show *Emails* view in Outlook, even if it is not the default view).	Y	Y	Y	Y	
Display emails saved in a SharePoint area grouped by Conversation Topic.	Y	Y	Y	Y	
Emails view uses paper clip icon to indicate email saved in SharePoint contains attachments.	Y[2]	Y[2]	Y[2]	Y[2]	
Drag and drop to move one or multiple emails or documents from one SharePoint area to another.	Y[3]	Y[3]	Y[3]	Y[3]	

1. In addition to icon overlays displayed by SharePoint, MacroView uses color highlighting of files in special states. The highlighting color scheme can be determined by each user.

2. *Emails* view is defined in MacroView sample libraries and / or in libraries based on MacroView library templates. In any view the paper-clip emoji can be displayed both as column heading and content for emails with attachments. Contact MacroView Services for more information.

3. Values *for Person or Group* and *Enterprise Keywords* columns are not preserved when moving to another site collection, because the underlying definitions are different.

Searching for emails and documents stored in SharePoint

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Search for documents in SharePoint (Online or On-Premises) based on their content and / or metadata.	Y	Y	Y	Y	
Search for emails stored in SharePoint (Online or On-Premises) based on their body / attachment content and / or their metadata (including metadata automatically recorded as the emails are saved).	Y	Y	Y	Y	
Perform search while working in Outlook.	Y	Y	Y	Y	
Formatted previews of search results.	Y	Y	Y	Y	
Click search result to open it in its application.	Y	Y	Y	Y	
Right-click a search result and choose *Open File Location* navigates to the area of SharePoint where the result is stored and displays the default view for that area.	Y	Y	Y	Y	
View and re-run recent searches.	Y	Y	Y	Y	
Save a search as a Favorite so that it can easily be re-run.	Y	Y	Y	Y	
Restrict scope of a search to a selected area (e.g. site, document library…).	Y	Y	Y	Y	
Search using a term in a hierarchical term set will find documents for which child terms have been recorded as metadata.	Y	Y	Y	Y	
Search Refiners to further narrow search results.	Y	Y	Y	Y	
Order Search results based on *Last Modified* or *Relevance*.	Y	Y	Y	Y	
Additional types of search can be configured (e.g. to reflect metadata usage within an organization / business unit).	Y	Y	Y	Y	
Additional controls can be added to search panels (e.g. pickers for hierarchical term sets).	Y[1]	Y[1]	Y[1]	Y[1]	
Search support on SharePoint Foundation 2013.	Y[2]	Y	n/a	n/a	

1. Customization which can be performed by MacroView Professional Services.

2. Metadata and Content-based searching using *Keyword Search* and *Email Search* panels of MacroView DMF and MacroView Message.

Working with attachments and links

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Drag and drop to save one or multiple attachments to an email.	Y	Y	Y	Y	
Click button in Outlook ribbon to save one or multiple attachments.	Y	Y	Y	Y	
Rename attachment as it is saved to SharePoint.	Y	Y	Y	Y	
Prompt for metadata that cannot be recorded automatically.	Y	Y	Y	Y	
Option to apply common metadata to multiple attachments (or to supply separately for each attachment being saved).	Y	Y	Y	Y	
Save incoming attachment as the next version of an existing document with a different name.	Y	Y	Y	Y	
Right-click file in SharePoint to send as attachment in new outgoing email.	Y	Y	Y	Y	
Right-click file in SharePoint to have it converted to PDF and then inserted as an attachment.	Y[1]	Y[1]	Y[1]	Y[1]	
Select version of file to insert as attachment.	Y	Y	Y	Y	
Drag and drop file(s) from SharePoint to insert them as attachments in an outgoing email.	Y	Y	Y	Y	
Generated attachment file name can automatically include Document ID and Version.	Y	Y	Y	Y	
Right-click file to send as durable link.	Y[2]	Y[2]	Y[2]	Y[2]	
Long attachment file names automatically trimmed to comply with SharePoint limits.	Y	Y	Y	Y	
Characters illegal in SharePoint file names automatically removed from attachment names.	Y	Y	Y	Y	
Original (unstripped) attachment file name automatically recorded as metadata.	Y	Y	Y	Y	
Original filename re-instated when file is inserted as an attachment in a subsequent email.	Y	Y	Y	Y	
File system attributes such as *Created, Last Modified* and *Author* automatically recorded as metadata as attachment is saved.	Y	Y	Y	Y	

1. If *Send As, PDF* custom option has been purchased and installed.
2. In SharePoint 2013 or 2010 environments, links generated by MacroView can be durable if Unique Document Numbering is configured.

Saving received and sent emails

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Drag and drop one or more emails to save them to SharePoint from any Outlook folder.	Y	Y	Y	Y	
Click to save one or more emails to SharePoint from any Outlook folder.	Y	Y	Y	Y	
Bulk email filing performed in the background, so that user can keep working while save proceeds.	Y	Y	Y	Y	
Emails saved in MSG format so that they re-open successfully in Outlook client.	Y	Y	Y	Y	
Complete email (including any attachments) saved in a single MSG file in SharePoint.	Y	Y	Y	Y	
Save email body and attachments separately in one drag and drop action.	Y[1]	Y[1]	Y[1]	Y[1]	
Automatic prevention of duplicate copies of any email in any one area of SharePoint store.	Y	Y	Y	Y	
No prompting to replace an existing email.	Y	Y	Y	Y	
Automatic selection of *Email* content type (if available in destination save area).	Y	Y	Y	Y	
All non-personal attributes of email automatically recorded as metadata.	Y[2]	Y[2]	Y[2]	Y[2]	
Prompt for metadata in destination content type that cannot be recorded automatically.	Y	Y	Y	Y	
Emails can be copied or moved to SharePoint.	Y	Y	Y	Y	
Copied emails marked as *Saved to SharePoint.*	Y	Y	Y	Y	
Save meeting requests and notifications.	Y	Y	Y	Y	
Warning / blocking if user attempts to save an email that has been stubbed / archived.	Y	Y	Y	Y	
Send and Save button.	Y	Y	Y	Y	
Prompt to save copy of outgoing email on Send.	Y	Y	Y	Y	
Auto-filing of sent emails based on rules.	Y	Y	Y	Y	
Auto-filing of received emails based on rules.	Y	Y	Y	Y	
Suggest locations to save sent / received emails.	Y[3]	Y[3]	N	N	
Saved emails tagged to streamline the saving of subsequent emails in the same conversation.	Y[3]	Y[3]	N	N	

1. Available in MacroView DMF / Message v8.4 and later releases.
2. Non-personal email attributes will be recorded automatically as metadata in the following scenarios:

a. Destination content type contains MacroView metadata columns (internal names have 'mv' prefix). An easy way to ensure this is to use the Email site content type that ships with MacroView DMF, MacroView Message, MacroView DMF 365 and MacroView Message 365.

b. Destination content type contains Microsoft Matter Center columns, and MacroView Matter Center connector is installed.

c. MacroView profiling (metadata capture) dialog has been customized to record in metadata columns found in destination content type.

3. Requires optional module MacroView Predictive Email Filing to be licensed and deployed.

Metadata support

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
All types of metadata column supported.	Y	Y	Y[1]	Y[1]	
Profiling (metadata capture) dialog dynamically driven by definition of metadata in SharePoint.	Y	Y	Y	Y	
Respects metadata column defaults defined in SharePoint for libraries / folder / document sets.	Y	Y	Y	Y	
Personal defaults for metadata columns	Y	Y	Y	Y	
Can nominate the level in a hierarchical term set that to be used as the base for a *Managed* metadata column.	Y	Y	Y	Y	
Current user as default value of *Person or Group* columns.	Y[2]	Y[2]	Y[2]	Y[2]	
File name displayed for editing in profiling (metadata capture) dialog.	Y	Y	Y	Y	
Option to suppress display of Title in the profiling (metadata capture) dialog.	Y	Y	Y	Y	
Able to have zero prompting for metadata yet automatic recording of email attributes as emails are saved to SharePoint.	Y	Y	Y	Y	
Profiling (metadata capture) dialog able to be customized – e.g. to provide different user experience for capturing metadata.	Y[3]	Y[3]	Y[3]	Y[3]	

1. External metadata columns not supported by MacroView DMF 365 or MacroView Message 365.

2. Optional module available from MacroView.

3. Handled as a customization by MacroView Professional Services.

Permissions / security

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Respects Site / Library / Document Set / Folder level permissions.	Y	Y	Y	Y	
Respects document level permissions (user cannot see any content that they would not see via the OOB SharePoint web browser UI).	Y	Y	Y	Y	
Users do NOT need to have Full Control role to be able to easily set the permissions for an email or attachment being saved so that it is accessible to only the current user (My Eyes Only) or to selected other users / groups of users.	Y[1]	Y[1]	Y[2]	Y[2]	
Highlighting of files, folders and document sets that have custom permissions.	Y	Y	Y	Y	
Search results automatically trimmed to include only documents – no web pages, list items, etc.	Y	Y	Y	Y	

1. If optional module MacroView Enhanced Document Security is licensed.

2. If optional module MacroView EDS is licensed and custom role created and assigned to users. Capability currently under development.

Audit / Compliance

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Saved emails automatically declared as an in-Place Record.	Y[1]	Y[1]	Y[1]	Y[1]	
Right-click a file to retrieve all activity in respect of that file from the SharePoint Audit Log and display as in a grid that can be copied to the Windows clipboard for further analysis.	Y[2]	Y[2]	N	N	

1. Can be done with a custom workflow available from MacroView Professional Services.

2. Audit Log feature of SharePoint must be activated.

Managing the Email and Document Store

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Right-click, Create Library	Y	Y	Y	Y	
Right-click, Create Folder	Y	Y	Y	Y	
Right-click, Create Document Set	Y	Y	Y	Y	
Delete Folder / Document set	Y	Y	Y	Y	
Rename Folder / Document set	Y	Y	Y	Y	
Right-click, Create Site	Y[1]	Y[1]	Y[1]	Y[1]	
Right-click, Delete / Archive Library or Site	Y[1]	Y[1]	Y[1]	Y[1]	
Right-click a document library, document set to open it in the OOB SharePoint browser UI.	Y	Y	Y	Y	

1. Available as a custom right-click menu item

Other Features and Capabilities

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Click a hyperlink in an email and document and have the linked document open exactly the same as if you had opened it using MacroView.	Y	Y	Y	Y	
Click a hyperlink in an external line-of-business system and be auto-navigated to the library, document set or folder than contains documents & emails for a customer, project, matter, etc.	Y	Y	Y	Y	
User interface can be in user's choice of language, including Chinese, Dutch, English, French, German, Japanese, Norwegian, Polish, Portuguese, Russian or Spanish.	Y	Y	Y	Y	
Right-click menus can be customized to have additional options.	Y[3]	Y[3]	Y[3]	Y[3]	
Menu items, commands and messages can be localized to reflect branding of organization – e.g. to re-label *SharePoint* as *Acme Docs.*	Y[3]	Y[3]	Y[3]	Y[3]	
Ability to prevent the display of standard commands in right-click menus.	Y	Y	Y	Y	

1. Adobe Reader / Acrobat XI or above.

2. If the client-side for one of these Microsoft-supplied synchronization tools is installed in the user PC, the *Create a Synchronized Copy* option will display, unless installation is configured to display Take Offline.

3. Customization that can be performed by MacroView Professional Services.

Installation and Deployment

	MacroView DMF	MacroView Message	MacroView DMF 365	MacroView Message 365	Other Product
Over 180 configuration settings, all of which can be deployed / enforced by using Group Policy.	Y	Y	Y	Y	
License keys entered centrally by a system administrator – end-users never need to enter a license key.	Y	Y	Y	Y	
Client-side components installed via MSI.	Y	Y	Y	Y	
Server-side components installed via WSP.	Y	Y	n/a	n/a	
Server-side caching for efficient navigation of large document stores (e.g. many hundreds of site collections, sites, libraries).	Y	Y	N	N	
Support for document stores with multiple SharePoint web applications running different versions of SharePoint.	Y	Y	N	N	
Support for hybrid document stores with SharePoint Online, One-Drive for Business and on-Premises SharePoint server farm(s).	Y	Y	N	N	
Proven compatibility with Citrix / VMWare for virtual desktop operation.	Y	Y	Y	Y	

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