

MacroView 2016 Highlights



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Throughout 2016 a major focus for MacroView has been to get our product offerings to take full advantage of Office 365 / SharePoint Online. This has been very successful – SharePoint Online implementations are now a big part of our sales and sales enquiries. The rising importance of Office 365 is also reflected in the name of our new website (www.macroview365.com) that we launched in early 2016.

During the year we also delivered a wide range of enhancements and refinements to the MacroView products used with on-premises SharePoint servers. We believe that MacroView is now uniquely well placed to deliver solutions for generating and managing documents and emails that use SharePoint on-premises, SharePoint Online and hybrid combinations of these SharePoint environments.

Here are the highlights (in no particular order). You can click any item to jump to a more detailed description.

- Improved Support for Office 365 / SharePoint Online
- New MacroView Licensing System
- Support for SharePoint 2016
- Free Plug-in for Generating Documents
- Faster Operation of MacroView ClauseBank in Low Bandwidth Environments
- Upload and Download of Large Documents
- Predictive Email Filing Enhancements
- Extended Support for Push Favorites
- Enhanced Support for Co-Authoring
- 64 Bit Installers
- New MacroView Help Center

Improved Support for Office 365 / SharePoint Online

Throughout 2016 we did a lot to improve both functionality and performance of MacroView DMF® and MacroView Message when they are used with an Office 365 SharePoint Online tenancy. These improvements are also relevant to anyone running MacroView DMF or MacroView Message in *Client Side Only* mode on an on-premises SharePoint server. Outcomes of that work included:

- **Custom Search Panels for O365 SharePoint Online**

In an Office 365 environment an organization can now define additional search panels to reflect their metadata usage – the same extensibility as when MacroView DMF is deployed in an on-premises SharePoint server.
- **MacroView UDN & AOI for O365 SharePoint Online**

Optional modules to automatically display Document ID and other document reference details in document footers and to display an intuitive menu of version control options on close are now available when documents are stored in SharePoint Online.
- **MacroView Case & Matter 365**

MacroView's popular DM solution for legal departments and small law firms now supports storing documents in SharePoint Online. Implementation is much simpler because there are no server components to install.
- **Push Favourites for O365 SharePoint Online**

We introduced support for Push Favourites in an Office 365 SharePoint Online environment. See *Extended Support for Push Favourites*.
- **Improved O365 Performance**

Right-click menus more responsive and navigation / filtering of SP Online sites and libraries significantly faster (>70% reduction in typical response times).

For more details see [MacroView Support for Office 365 SharePoint Online](#).

New MacroView Licensing System

In 2016 we introduced a new system running in Microsoft Azure to handle the licensing of MacroView products for use with Office 365 SharePoint Online and in Client Side Only mode.

This new licensing system has allowed us to retain one of the distinctive advantages of MacroView software, which is that individual users do NOT have to enter license keys or similar – all licensing can be done centrally for both SharePoint Online and SharePoint on-premises implementations.

Support for SharePoint 2016

Support for SharePoint Server 2016 was included from v8.4 of MacroView DMF and MacroView Message in October 2016. Support for Office 2016 was introduced with DMF v8 in 2015.

Free Plug-in for Generating Documents

During 2016 we made right-click, *Create Document* available to all existing MacroView DMF customers as a no-cost plug-in.

As its name suggests, *Create Document* is about making it easy to generate new documents. To start the document generation you right-click in the MacroView tree-view on an area in SharePoint (Online or on-premises). You then select a Microsoft Office template from the menu displayed by *Create Document* and the resulting new document will be stored in the SharePoint area on which you right-clicked.

The *Create Document* plug-in can support a range of deployment scenarios:

- Displays a menu of the Microsoft Office templates that you would see if you were in Microsoft Word, Excel or PowerPoint. This menu can be hierarchical. This scenario is ideal for those organisations that already have custom Microsoft Office templates in place.
- Displays a menu of templates associated with the Content Types defined in the SharePoint document library that you have right-clicked. This is relevant to organizations that have followed the standard SharePoint approach of having a Content Type for each template.
- Displays a menu of 'Blank' templates. This scenario is for organizations that do not have any custom Office templates deployed.

The *Create Document* plug-in can be configured to allow the use of templates that have code to 'silent save' the documents that they generate – i.e. to save the document to SharePoint without needing to display the MacroView Save As to SharePoint dialog or profiling dialog.

See [Adding Document Generation to your MacroView DMF Solution](#) for more details.

Streamline the generation and saving of new documents in SharePoint Online or on-premises.

Faster Operation of MacroView ClauseBank in Low Bandwidth Environments

We developed the new Agent feature of MacroView ClauseBank in response to requests from a number of customers for a way to speed up the operation of MacroView ClauseBank in their more remote offices. Those offices had relatively low bandwidth connections back to the central SharePoint server where the ClauseBank content was stored.

Great news for users in remote offices with slow connections to a central SharePoint server or SharePoint Online.

The new ClauseBank Agent performs a one-way synchronisation of the content in selected clause libraries so that the user has an up-to-date copy of the clauses on their own PC. As a result, previewing and retrieval of the clauses is dramatically faster. The ClauseBank Agent performs the synchronisation in the background, when the user PC is not busy with other tasks. The synchronisation and replication is done using Microsoft standard software components.

Thanks to the ClauseBank Agent, ClauseLinks to replicated content items can be expanded while the user is Offline – i.e. not connected to SharePoint. These ClauseLinks are a great way to manage content that is common across multiple templates or precedent documents. These ClauseLink expansions are a first step towards allowing offline usage of all ClauseBank functionality.

Upload and Download of Large Documents

Very large documents can now be uploaded and downloaded by MacroView DMF.

During 2016 we switched to a new .NET technique for uploading and downloading files to / from SharePoint. This applies to all uploads and downloads except saves and opens done in Word, Excel and PowerPoint.

The new technique relies on WebDAV and allows the uploading and downloading of files that are as large as the file size limit configured at the SharePoint server. By default this limit is 250MB for SharePoint 2013 and 50MB for SharePoint 2010. The new technique eliminates a 30% transmission overhead (e.g. this meant that the largest file that could previously be uploaded to a 2010 server was 37MB). The new technique also removes a constraint based on the amount of available memory.

Predictive Email Filing Enhancements

2016 saw two enhancements to MacroView Predictive Email Filing – an optional module available for MacroView DMF and MacroView Message that makes filing of emails even smarter.

The first enhancement was to **allow PEF to be switched ON or OFF for each SharePoint web application**. Previously if PEF was installed it applied for emails saved to all web applications. Each web application appears as a top-level node in the MacroView tree-view displayed in *Browse* mode.

The second enhancement was to allow **outgoing emails to be filed automatically** based on the PEF tag in their subject. Previously this style of automatic filing only applied to incoming emails.

We also created an API to allow a customer organization to pre-populate the tables used by the PEF mechanism with user-defined tags – e.g. a tag to identify Customer or Project. This is part of our overall objective to make MacroView DMF highly extensible and thereby able to handle the widest possible range of requirements of customer organizations.

Extended Support for Push Favorites

The Push Favourites mechanism automatically creates Favourites for a user. These new Favourites might be for the sites / document libraries / document sets / folders that correspond to projects or customers which the user needs to work with frequently. A user can also receive the Favourites that are being pushed out to his / her colleagues.

The advantage of Push Favourites is that the user has rapid access to the areas in SharePoint that they need to work in, without having to first navigate to those areas in Browse mode and add them as favourites manually.

Favourites can now be created automatically to facilitate a user's access to areas in SharePoint Online, SharePoint on-premises or both.

The Push Favourites mechanism has always supported retrieving the details about users and their favourite areas from Lists in an on-premises SharePoint Server. During 2016 we extended the Push Favourites mechanism to enable favourite areas in SharePoint Online. With this new configuration the details stored in SharePoint lists are supplemented by an Azure remote event receiver that MacroView supplies.

We also extended Push Favourites to support retrieving from database tables in an on-premises SQL Server. An organization can populate and maintain these tables either by their own code or by using a simple app that is supplied by MacroView.

We wanted to make it easy for an organization to install and try the Push Favourites mechanism for themselves. To this end we included a List-based configuration of Push Favourites as part of the MacroView DMF product download. An organization can use this to push out a limited number of Favourites to their users before having to purchase a license for the Push Favourites mechanism.

Enhanced Support for Co-Authoring

MacroView DMF and MacroView Message are based on Microsoft SharePoint – they use SharePoint to store and search for documents and emails. The documents and emails are stored as per normal in SharePoint. There are a number of advantages of this way we 'stand on the shoulders of SharePoint'. One of the most exciting is the way SharePoint extends Microsoft Word, Excel or PowerPoint to allow co-authoring of documents (also known as collaborative editing of documents).

With co-authoring a number of users can have the same document open for editing simultaneously, including on different platforms such as iOS and Office web apps. Each user can see the changes being made by all the other users. To be available for co-authoring a document must not be checked out by any of the users.

There are a number of ways a MacroView DMF user can open a document for editing without checking it out. During 2016 we enhanced the MacroView DMF optional modules UDN and AOI so that they also supported documents that were opened for editing but not checked out.

The end result is that MacroView solutions facilitate collaborative editing of documents while at the same time providing the sort of advanced unique numbering and version control features that users expect, based on their experience with traditional DM systems.

In August 2016 we published a new MacroView case study titled [DM Solution for the New Normal Workplace](#), which describes how by combining MacroView DMF with Microsoft SharePoint® international legal firm Webb Henderson has created a successful DM solution that enables their widely-distributed users to work collaboratively on documents.



64 Bit Installers

Historically an organisation wanting to implement MacroView DMF or MacroView Message had to use the 32 bit installer if they were running 32 bit Microsoft Office, even if the machine was running under 64 bit Windows. This was a source of some confusion so in late 2016 we switched to using an installer that reflects the 'bitness' of your Windows environment (rather than that of Microsoft Office). The new installers have inbuilt checks and warnings if they are used inappropriately.

New MacroView Help Center

In early October 2016 we implemented our new MacroView Help Center. This is powered by the industry-leading Zendesk software and allows much improved tracking of support tickets, convenient download of MacroView software and an integrated Knowledge Base. Customers can continue to log support tickets by emailing MacroView Support. In due course customers will be able to view the status of their tickets and log new tickets using the MacroView Help Center.

The screenshot shows the MacroView Help Center website. At the top left is the 'MacroView' logo in blue. To the right is a 'Sign in' button. Below the logo is a search bar with a magnifying glass icon and the word 'Search'. The main content area is divided into several sections:

- ANNOUNCEMENTS:**
 - ★ MacroView Case and Matter 8.0 release
 - ★ New MacroView Support Centre!
 - ★ MacroView DMF / Message 8.4 release
 - ★ MacroView UDN 6.1 and AOI 6.1 release
 - ★ MacroView ClauseBank 8.3 release
- FAQ:**
 - ★ Where do I find downloads for MacroView software?
 - How do I submit a support request?
 - Why don't I see all the downloads I expect to see?
 - How do I register on the MacroView Support Centre?
 - Can I still access the previous knowledge base and forum conten
- Document Management Framework (DMF) and Message**
- SUPPORT:**
 - Adobe Reader api-ms-win-crt-runtime.dll error
 - SharePoint, Office and Adobe version support
 - DMF customisations disappearing from Microsoft Office
 - How to generate an information level trace file
- ADMINISTRATORS:**
 - Quick Start Guide (client side only)
 - Quick Start Guide (on-premises)

More Information

For more information about MacroView software and how they enable solutions for generating & managing documents & emails contact solutions@macroview.com.au.