Mountain States Employers Council:
MacroView DMF – Key to Successful DM on SharePoint

Despite careful planning, design and change management the move to a new SharePoint-based document and email management solution at Mountain States Employers Council was very nearly a disaster.

Within weeks of implementation MSEC users complained that the out-of-the-box interface to SharePoint in Microsoft Office was making it much more difficult for them to perform routine document and email handling tasks. Many users reported that the new SharePoint-based filing system quadrupled the time it took to do their jobs.

MSEC deployed MacroView DMF and found that user productivity was restored almost immediately, and in some cases even improved compared to the previous file share and Outlook folder environment. A further benefit of MacroView DMF was a marked improvement in the capture of important metadata.

Careful Planning for the new SharePoint DM Environment

Mountain States Employers Council Inc. provides its 4,000 member organizations with professional and cost effective human resource and employment law services. MSEC has over 175 staff and is headquartered in Denver, Colorado.

Microsoft SharePoint plays a key role in enabling MSEC employees to provide world-class customer service. In addition to providing the platform for document management, SharePoint supports the MSEC Intranet and facilitates collaboration. MSEC uses Office 2010 to fully leverage the Microsoft stack.

In mid-2010 MSEC decided that they could obtain further value from their SharePoint investment by moving the management of documents and emails to SharePoint 2010. Previously, MSEC staff used network file shares to store their documents and emails were stored in Outlook folders.

MSEC was particularly impressed by SharePoint's metadata capabilities, which would enable more flexible classification and retrieval of emails and documents. They created custom metadata field types so as to make metadata capture as automatic as possible. A good example of this custom metadata was to set the current user as the default selection in Person / Group columns.

To MSEC management and from the perspective of the IT Team, the new SharePoint DM environment looked great. It would enable emails and other documents to be managed consistently, it was configured to capture useful metadata and it was cost effective.

Implementation Pain - Negative User Reaction to Out-of-the-Box SharePoint

The new SharePoint DM solution went into production in July 2011. Within 2 weeks of implementation, negative feedback from users was so great that it became painfully apparent that MSEC would need to back out of the solution if IT could not immediately address these user concerns.

MSEC users complained that it was much more difficult to visualize and navigate the new SharePoint document store, compared to the previous file share / Outlook folder environment. The users also found it inconvenient and counter-intuitive to jump between Office applications and the web browser to save documents or attach multiple files to an email.

The MSEC IT Department realized that they had underestimated the 'human factors' associated with using the out-of-the-box user interface that Microsoft SharePoint provides for managing documents and emails. Those business users were unable to work with that out-of-the-box interface to manage their documents across the large number of libraries within the new environment.

MacroView DMF to the Rescue

MSEC searched the market for a SharePoint add-on that would address this critical 'human factors' issue. They selected MacroView Document Management Framework (DMF), the only product that met all of their requirements. Within 30 days of the initial implementation they deployed MacroView DMF and user reaction improved almost immediately.

CIO Mark Buttice, notes: "Thanks to MacroView DMF, user productivity was restored, even improved in several situations. That in turn has helped to make our new SharePoint–based document management a success. Without DMF, we believe we would have backed out of our implementation which is hard to imagine at this point."

Making SharePoint Feel Familiar

MSEC users liked the way MacroView DMF provided them with an accurate and intuitive tree-view display of the structure of the SharePoint document store. That tree-view made SharePoint feel familiar based on their previous use of file shares and Outlook folders.

MacroView pane in Outlook provides convenient, intuitive access to SharePoint. Note *Favorites* mode

Reducing User Input Actions

One of the major frustrations reported by MSEC users as they attempted to use the OOB SharePoint interface was they needed to jump out to the web browser when they wanted to interact with SharePoint. MacroView DMF allowed MSEC users to browse, search, save to and generally interact with the SharePoint document store while they continued to work in Outlook, Word, Excel, PowerPoint or Adobe Reader. MacroView DMF reduced required user input actions, in some cases quite dramatically. As an example, the user input actions required to search for a document in SharePoint and insert that document as an attachment to an outgoing email reduced by at least 64%, compared to the OOB SharePoint web browser UI.

Efficient Navigation of a Large SharePoint Document Store

The DMF tree-view coped with MSEC's large numbers of sites, document libraries and document sets. The *Favorites* mode in MacroView DMF was important in this regard, because it provided a user with one-click access to the areas in SharePoint that they used frequently. MSEC users saw adding SharePoint areas as Favorites, as a welcome way to customize the tool to reflect their personal usage patterns. The resulting sense of ownership was another positive factor in terms of user adoption.

Key Success Factor: Improved Metadata Quality with Reduced User Effort

A key success factor for MacroView DMF was the way it significantly improved the user experience around the capture of metadata. This led to a marked improvement in the overall quality of metadata, while at the same time dramatically reducing the effort required of users as they saved documents and emails to SharePoint.

Improved Metadata Quality

The out-of-the-box SharePoint interface did not prompt for metadata as user uploaded multiple documents. Staff were forgetting to go back into SharePoint and update the documents to record that metadata. As a result, the carefully designed metadata structure was often missing vital data. By prompting users consistently for metadata during upload, including multiple file uploads, MacroView DMF eliminated this failure to capture metadata.
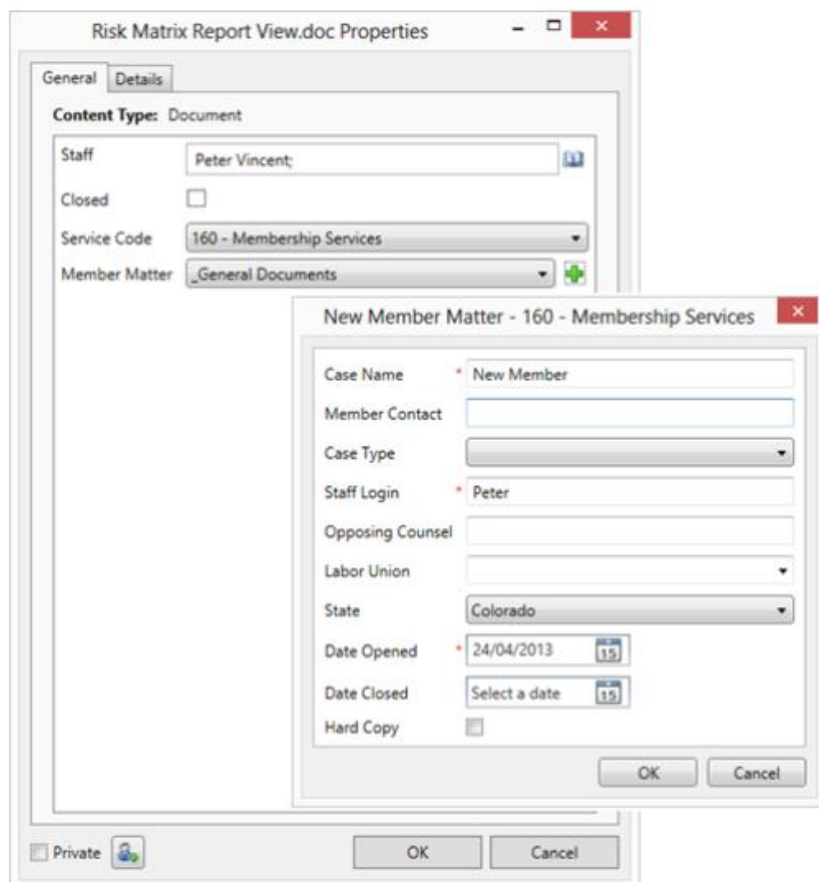
Dramatically Reduced User Effort

MacroView also extended MacroView DMF to support a number of custom metadata columns. One of these was a Person-Group column that was customized so that the current user was displayed as the default value. This small customization eliminated several user input actions as most documents were being saved.

The biggest reduction in user effort when saving documents resulted from another customization of the MacroView DMF metadata capture form. MSEC commissioned MacroView to add a *New* button to the form, which users could click when they realized that the Member Matter they wanted to choose was not yet created in the CRM system. A sub-form captured details for a new Member Matter and created it in the CRM system. Previously the user had to abandon the save, go to the CRM system and create the new record, return to MacroView DMF to resume the save and then find the record that they had just added.

The customized metadata capture form allowed users to create a CRM record as they saved the first document for a new Member Matter.

The customized MacroView metadata capture form reduced user input actions by over 60% and led directly to increased user satisfaction with and adoption of SharePoint as the solution for managing documents and emails.

Customized MacroView DMF profiling dialog being used to create a new record in the CRM system.

MacroView Document Drafting and Automation Solutions

MacroView document drafting & automation solutions are used by leading global law firms.

MacroView ClauseBank

Enables faster, safer document preparation by making it easy for business users to re-use standard, approved text graphics and slide content as they work in Microsoft Word, Outlook or PowerPoint. The re-usable content is stored as mini-documents in SharePoint document libraries. Provides convenient browsing, searching, previewing and retrieval of selected content, and ensures that content is up-to-date.

MacroView Precedent

Automate the assembly of documents by using a Markup Toolbar to insert tags into master documents. MacroView Precedent runs in Microsoft Word and is designed for business users, but can cope with complex documents and document packages. Supports retrieval of variable data from any data store, including SharePoint lists.

MacroView .Net Templates

MacroView uses the latest ,NET techniques to create automated templates that are tailored to the requirements of your firm. The resulting documents have high-quality presentation and distinctive content. In designing and developing these solutions MacroView draws on over 20 years' experience, which ensures that user input effort is minimized, both for initial creation and for subsequent editing. The generated documents are automatically saved and profiled in your DM system or SharePoint.

MacroView Document and Email Management Solutions

MacroView document and email management solutions are used by over 300 organizations around the world, in a wide range of industries.

MacroView Document Management Framework (DMF)

MacroView DMF extends and enhances the document management capabilities of Microsoft SharePoint to enable DM solutions that are popular with business users and that have the functionality to be a viable alternative to a traditional DM system.

MacroView DMF provides a tree-view of the structure of a SharePoint document store, which makes viewing and interacting with SharePoint feel familiar to users based on their experience with Windows file shares and Outlook folders.

MacroView DMF adds integration to Microsoft Outlook, Word, Excel, PowerPoint, Adobe Reader / Acrobat and to Windows itself, so that users have consistent and intuitive interaction with SharePoint for managing documents and emails. With MacroView DMF installed, Outlook becomes your DM desktop for SharePoint.

MacroView DMF provides best-available DM facilities for organizations running SharePoint Server (2013 or 2010) on premises. In addition, MacroView DMF supports Office 365 and OneDrive for Business, and so enables hybrid solutions.

MacroView DMF can be customized to meet the specific needs of an organization.

MacroView DMF Mobile App

MacroView DMF Mobile apps for iOS and Android are available as optional modules providing much of the functionality of MacroView Case and Matter on mobile devices.

MacroView Predictive Email Filing

This is an optional module for both MacroView DMF and MacroView Message which suggests locations for saving incoming and outgoing emails and enables subsequent emails in the same conversation to be saved with minimal or even zero user effort.

MacroView Case and Matter

MacroView Case and Matter is the ideal document and email management solution for any organization where activity is organized into cases or matters, like corporate legal departments. Users will find that the solution provides the advanced capabilities that they expect based on their previous use of a traditional DM system, such as iManage FileSite or OpenText eDocs.

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For more information visit:
www.macroviewusa.com
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