MacroView

MacroView Case and Matter Solution

MacroView Case and Matter is the ideal document and email management solution for any organization where activity is organized into cases or matters, such as 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. MacroView Case and Matter also provides a convenient, easy-to-use way of managing the cases and matters.

MacroView Case and Matter unlocks the power of Microsoft SharePoint and Office 365, while at the same time providing an excellent experience for users working in Microsoft Outlook, Word, Excel, PowerPoint, Adobe Reader and Windows itself.

Familiar experience when managing documents and emails for Cases / Matters

MacroView Case and Matter provides the best-available support for interacting with a document store in Microsoft SharePoint or Office 365 while you work in Microsoft Outlook. The solution dramatically improves the out-of-the-box integration of SharePoint with Word, Excel or PowerPoint. MacroView Case and Matter makes SharePoint / Office 365 feel as familiar as working with Windows file shares or folders in Outlook.

SharePoint

Familiar User Experience

- Browse a tree-view of areas corresponding to cases and matters in your on-premises SharePoint server or Office 365 tenancy.

- Click to view and open the documents and emails stored for cases and matters.

- Drag and drop to save emails and attachments to areas corresponding to cases and matters.

- Drag and drop to upload one or multiple documents from any Windows folder.

- Right-click menu provides a full range of features for working with documents & emails such as opening, sending as attachments, etc.

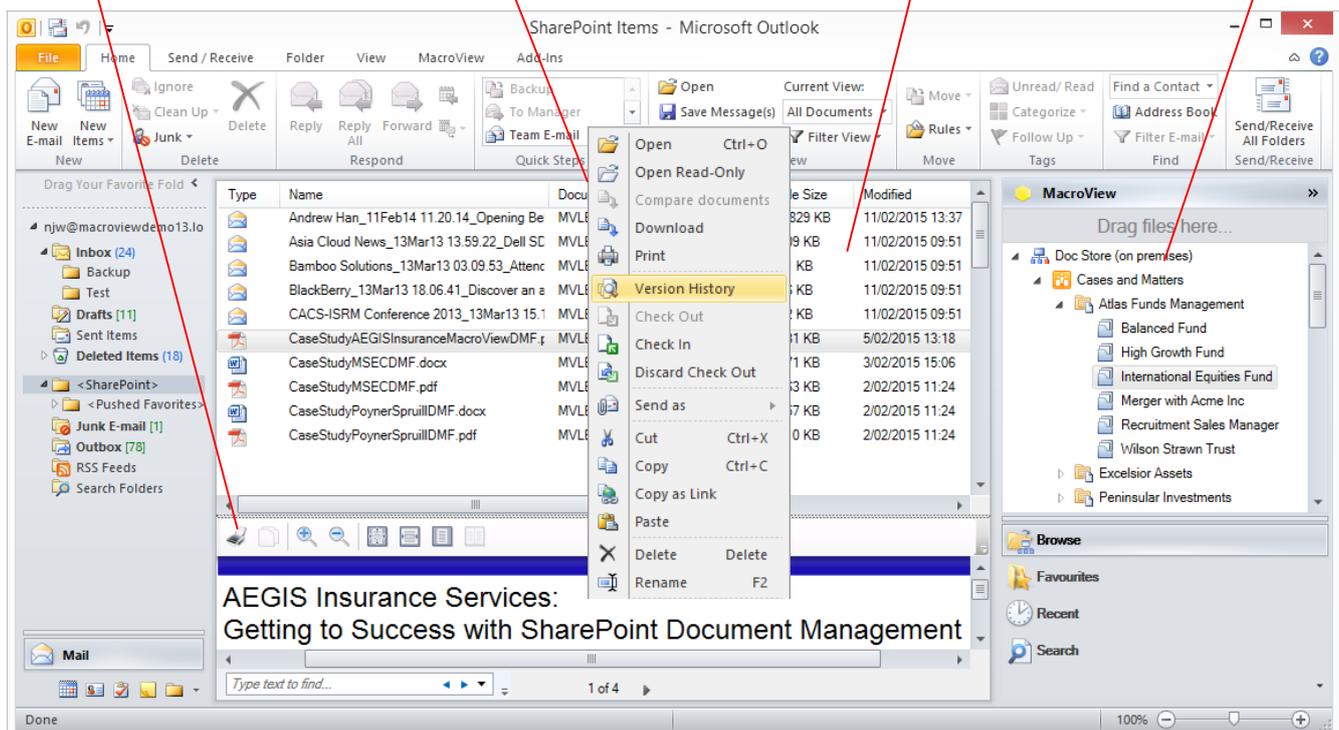- Consistent experience across Word, Excel, PowerPoint and MacroView DMF Explorer.

Formatted **previews** of documents and emails stored in on-premises SharePoint.

Rich, Windows-style right-click menu.

Click on a case or matter area to see its documents and emails.

Familiar tree-view display of available cases / matters.

MacroView pane lets you save, retrieve and manage documents and emails for cases / matters directly from Outlook.

"MacroView Case and Matter is a comprehensive solution for a legal department, or for that matter a small law firm. It provides an intuitive and convenient way to generate, save, search for, open and generally manage documents and emails for matters, as well as a practical way to manage the matters themselves."

Profiling / Metadata Handling

MacroView Case and Matter captures metadata to make it easier to find documents and emails. Most metadata is captured automatically, but when it does prompt the user for metadata the user experience is easier and more efficient than with a traditional DM system.

- Fully automatic capture of email attributes.

- Automatic recording of Case / Matter.

- Option to be prompted only once for metadata when saving multiple files.

- The solution comes with predefined metadata attributes *Matter Type*, *Document Type* taxonomy and *Document Author* – which can be configured and extended to reflect your local usage and requirements.

Advanced Document Management Functionality

Check-Out, Check-In, Version Handling

MacroView significantly enhances the user experience and extends the capability of SharePoint for check-out, check-in and version handling, creating an attractive alternative to a traditional DM system.
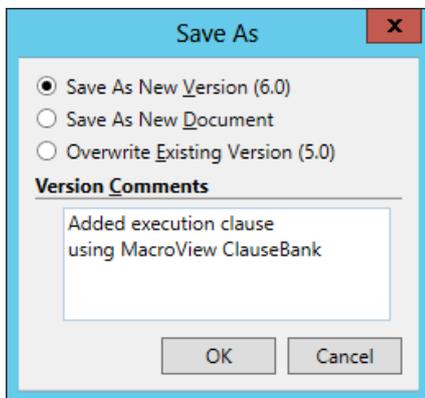

- Option to automatically check-out on open – removes the need for a user to check-out in a separate step.

- Search for documents *Checked Out to Me*.

- Right-click to open a version of a document or to inspect Version History.

- Metadata reused and Version history preserved as you move a document to a different Case / Matter.

- As you close a Word document that you have edited you have the same options as in a traditional DM system, including replacing an existing Major version and creating a new document.
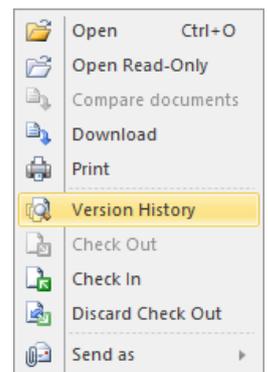
Unique Document Numbering

MacroView Case and Matter includes MacroView UDN, which extends and enhances the native unique document numbering capability of SharePoint to meet the needs of users experienced with traditional DM.

- Number documents sequentially across the entire SharePoint document store, with control over formatting and starting offset.

- Word document footers and caption of the Word window automatically updated to show Document ID and current version.
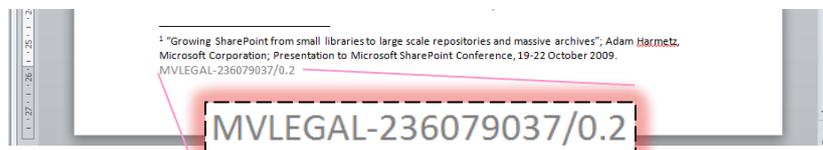

Enhanced Document Level Security

- With MacroView Case and Matter any user who can save a document can easily set access permissions for that document, such *as* making a sensitive document *My Eyes Only* and assigning specific levels of access to selected other users and / or groups.

Document Comparison

- MacroView Case and Matter comes with an inbuilt link to the native *Review>Compare* feature of Microsoft Word 2010 and 2013. Integration with Workshare Compare (Delta View) is an available option.

Audit, Compliance and Workflow

- MacroView Case and Matter provides convenient access to the Compliance features of SharePoint, such as Legal Holds & *Declare as Record.* You can also right-click to advance a document to the next stage in a workflow.

- The *Audit* option on the MacroView Case and Matter right-click menu provides a convenient display of activity related to a selected document as recorded in the SharePoint Audit Log.
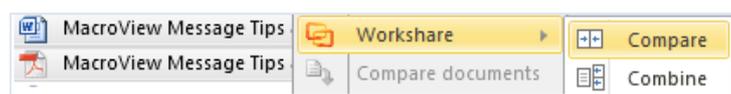
"MacroView Case and Matter uses your existing Microsoft SharePoint infrastructure, which makes it highly cost effective. Users can keep working in familiar applications – they don't know or care that MacroView uses SharePoint behind the scenes."

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MacroView Case and Matter Solution

Intuitive, convenient searching for documents and emails related to Cases / Matters

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 Case and Matter provides an intuitive search interface, which is powered behind the scenes by the Microsoft SharePoint search engine. The MacroView search experience can readily be tailored to reflect your specific needs.
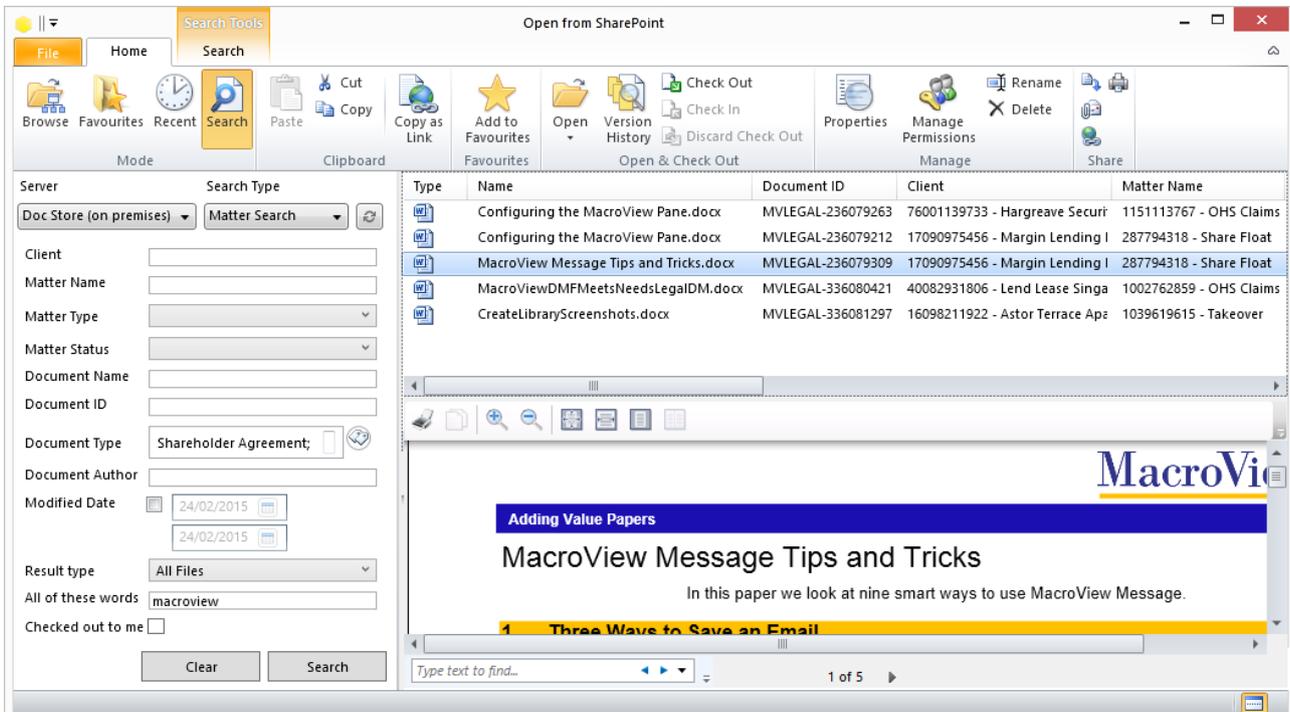

Matter Search panel in Microsoft Word - makes it easy to search for documents related to Matters

Streamline the generation of documents for Cases / Matters

MacroView Case and Matter makes it easy to generate new documents and have them saved and profiled in the area corresponding to a Case or Matter. You simply right-click on the area for the Case / Matter, choose *Create New Document* and then select the document type you want to generate.

The solution ships with a number of sample templates that use the latest .Net techniques. Additional templates can easily be added – the sub-menu of available document types will adjust automatically.
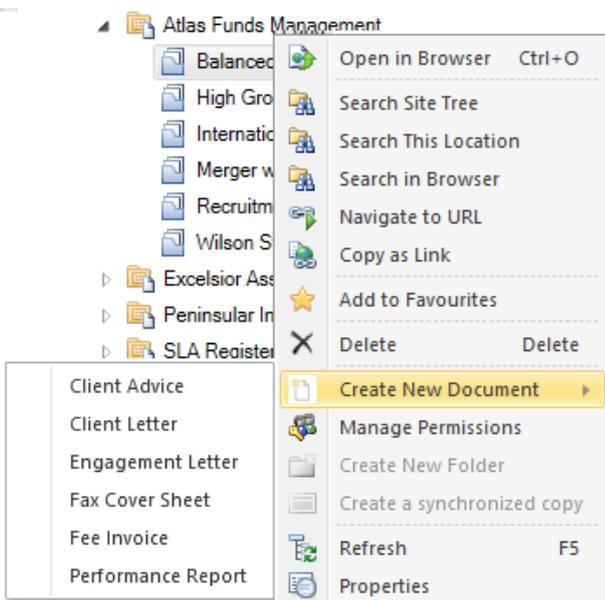
**Optional Module – MacroView ClauseBank**

- MacroView ClauseBank further streamlines the preparation of documents by making it easy to find, view, retrieve and re-use standard, approved text and graphics content.

- Browse a tree of available content clauses, view categories or search for clauses based on words they contain.

- Selected clauses are inserted fully formatted in the Word document, Outlook email or PowerPoint presentation that you are preparing.

- Out-of-date content cannot be retrieved.

- Each content item (clause) is a mini-document, stored in central SharePoint document libraries, which means that they can be accessed from anywhere, via the web.

- You can add new clauses simply by right-clicking selected content and choosing *Create New Clause*.

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## A simple way to manage Cases and Matters

MacroView Case and Matter provides a simple yet effective way to manage Cases or Matters. Matters can be grouped in a way that makes sense to your organization – e.g. all the Matters for a Practice Group, all the Cases for a Year, etc. Clicking on the SharePoint library that corresponds to one of these groups displays a list of Cases / Matters, together with metadata attributes for each Case / Matter.

- Filter and sort using metadata to drill down to the Case / Matter that you want to work with.

- Views for *Active Matters* and *My Matters.*

- Clicking the entry for a Case / Matter drills down to display the documents and emails that have been stored for that Case / Matter – along with their metadata attributes.

- Right-click on the entry for a Case / Matter to update its metadata – e.g. Status to *Inactive.*

- Archive a Case / Matter by right-clicking it and choosing *Archive Case / Archive Matter.*

- If required, any user who can save documents can create a new Case / Matter – simply by right-clicking the relevant group library.
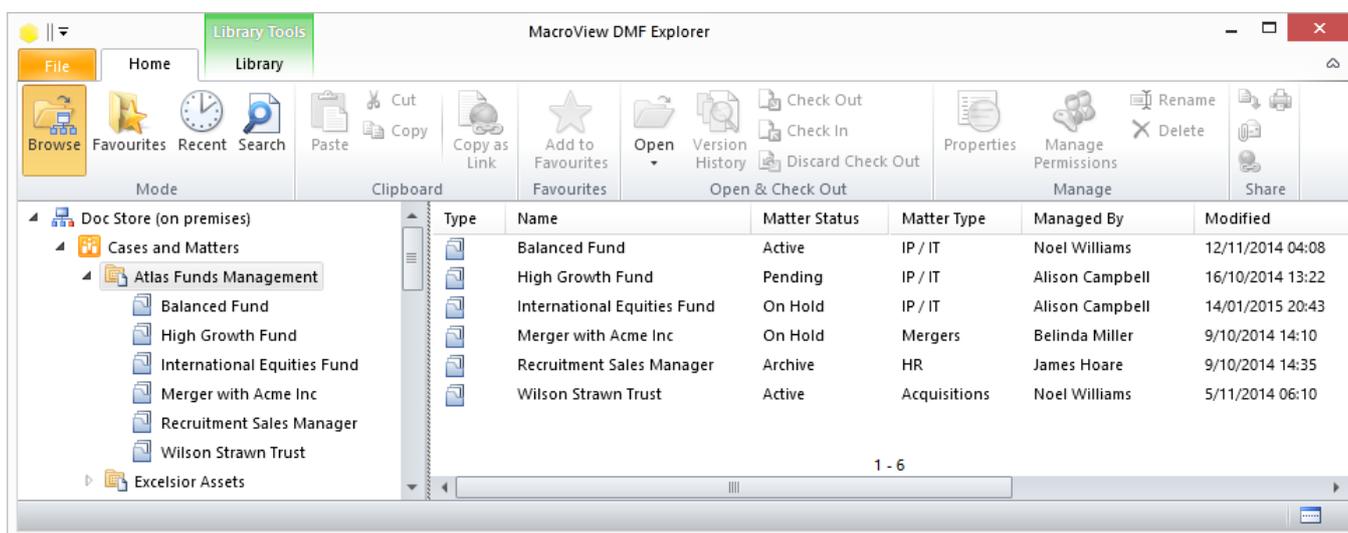
Viewing the list of Matters for a client using MacroView Case and Matter in MacroView DMF Explorer

Mobile and Offline Operation
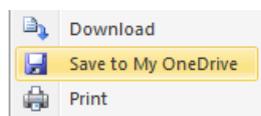
- If you want to work with some documents while you are out of the office you can right-click and save them to your personal cloud store – e.g. *Save to My OneDrive*, *Save to My DropBox*. When you return to the office you can upload the modified documents and create new versions of existing documents in the Case / Matter document store.

- MacroView DMF Mobile apps for iOS and Android are available as optional modules. They provide much of the functionality of MacroView Case and Matter on a mobile device.

Office 365, OneDrive for Business and Hybrid Cloud Support

MacroView Case and Matter is designed to work best with on-premises SharePoint. However it also supports Office 365 and OneDrive for Business – thereby providing a true hybrid cloud capability.

"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/)

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