MacroView

MacroView 2015 Highlights

2015 has been a big year for improvements in MacroView products. Again all these improvements have been in direct response to customer requests – including requests made at the MacroView User Group meetings that were held in London, Netherlands and Bermuda during 2015. The resulting MacroView products enable even better customer solutions for document management, email management, smart document drafting and automated document assembly.

Here are the highlights (in no particular order):

- MacroView ClauseBank v8
- Preview of MacroView Automated Document Assembly (ADA)
- Office 365-Only Versions of MacroView DMF and MacroView Message
- Previews of Emails and Images in Office 365 / SharePoint Online
- Host Named Site Collection and Client Side Only support
- New Product – MacroView Case and Matter
- Support for Microsoft Matter Center
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- User Defined Tags in MacroView Predictive Email Filing
- *Search Site Tree* Even Better
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- Adobe XI and Adobe DC Support
- Separate button for *Insert Link to a File*
- Enhanced Operation with Microsoft Visio, Project and Other Applications
- Re-Branding and Localization Support
- Support for Windows 10 and Office 2016
- Various Enhancements to MacroView UDN, AOI
- Enhanced support for right-click customizations
- Improved handling of large file uploads
- Highlighting of files with unique permissions
- Prevent Saving of Certain Emails
- "Smart Start" Feature for Documents
- Performance, Stability and Memory Use Improvements
- Faster Downloads of MacroView Software
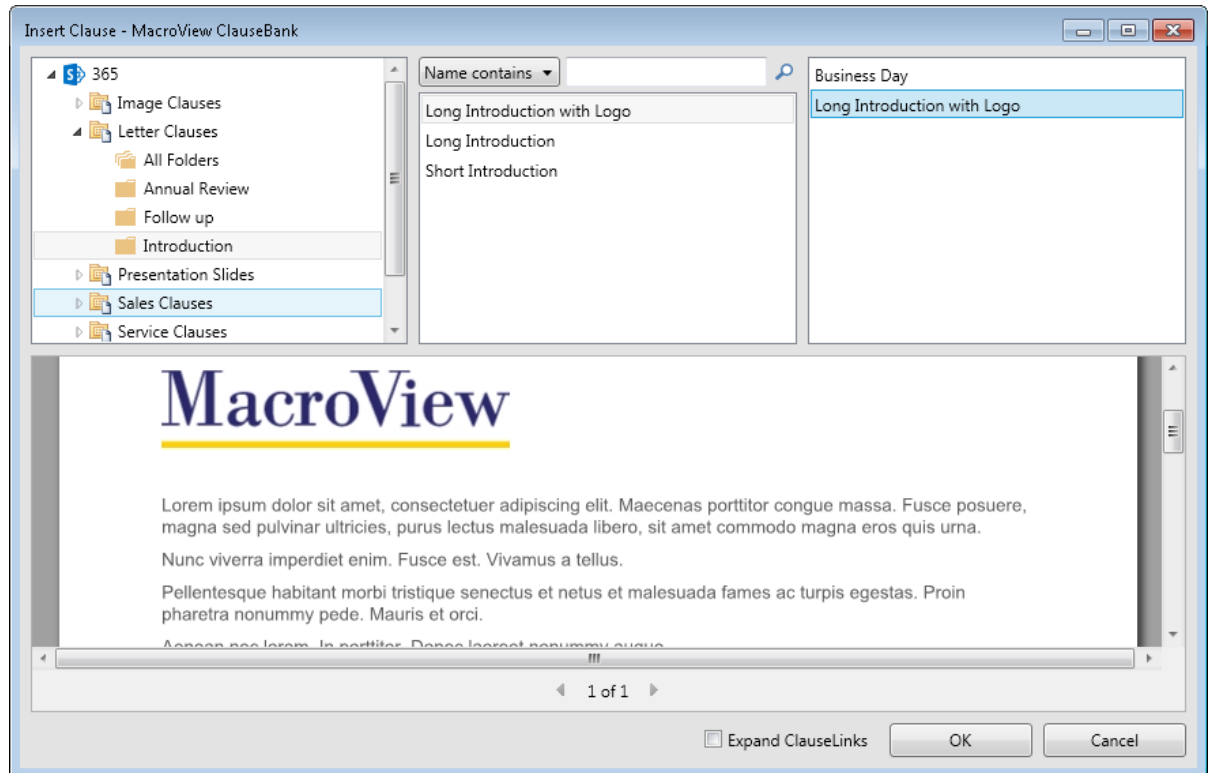
MacroView ClauseBank v8

2015 saw the release of MacroView ClauseBank version 8. ClauseBank enables faster, safer drafting of Word documents, Outlook emails and PowerPoint presentations by making it easy to find and reuse standard, approved text and graphics content. The content items are stored in a central SharePoint site, which allows 'from anywhere' access and facilitates deployment compared to many other approaches for managing re-usable document content.

There's a lot to like about this latest version of MacroView ClauseBank, including:

- Significantly faster performance.
- Great new UI, with extensive support for drag and drop – e.g. to select the content items you want to insert into your document, email or presentation.
- Ability to use nested folders to create a tree of available content items with as many levels as you require.
- Support for Office 2016 and continued support for Office 2007, 2010 and 2013.
- Ability to search for content items even if you are implementing on SharePoint Foundation.
- Can be implemented on Office 365 / SharePoint Online.

MacroView ClauseBank addresses a key problem for content management systems, which is how to keep the content up-to-date and relevant to the changing needs of an organization. It does this by making it very easy for approved end-users to add new content items to the central bank of content – they simply select the content in Microsoft Word and choose *New Clause*.

This MacroView blog post provides more details, including the steps to get started quickly with ClauseBank on Office 365 / SharePoint Online.

MacroView ClauseBank v8 implemented in Office 365 / SharePoint Online using nested folders

Preview of MacroView Automated Document Assembly (ADA)

Assembling a document involves creating a document based on a template and then inserting the details relevant to a particular customer or transaction. The details can be entered by the user in response to prompts or they might be retrieved from line-of-business databases, answer files or other data stores. Automating that assembly has obvious benefits for overall productivity and accuracy.

During 2015 we created a new tool called MacroView ADA which automates the assembly of Microsoft Word documents. Importantly the user interface for generating a new document is very end-user friendly – so much so that you can give it to customers so that they can enter the details and generate their own documents, while you retain tight control over validation, layout and standard content. This opens the way to providing new services in today's connected, collaborative business world.

Initial previews of MacroView ADA have been very well received and we are looking forward to launching it as a new product during 2016.

Office 365-Only Versions of MacroView DMF and MacroView Message

During 2015 we enhanced the operation of MacroView DMF and MacroView Message on Office 365 / SharePoint Online. Improvements include separate display of My Sites, sorting of site collections and Metadata Navigation.

We also created two new products:

- MacroView DMF 365
- MacroView Message 365

These are highly cost effective for organizations that want to work only with Office 365 / SharePoint Online. The original MacroView DMF and MacroView Message products can

be thought of as MacroView DMF Hybrid and MacroView Message Hybrid because they allow use of both on-premises SharePoint Server and Office 365 / SharePoint Online.

Previews of Emails and Images in Office 365 / SharePoint Online

An important aspect of the improved support for Office 365 / SharePoint Online in the course of 2015 was around display of formatted previews. We added the ability to preview both emails (MSG files) and graphic images.
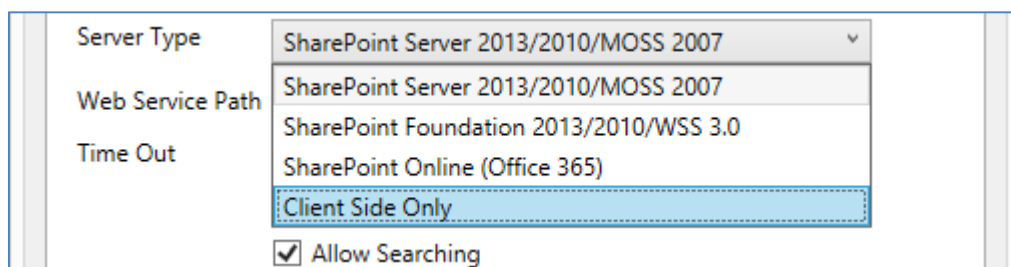
A related improvement in MacroView DMF / Message v8 (to be released in December 2015) is support for Picture Libraries in Office 365 / SharePoint Online.

Host Named Site Collection and Client Side Only support

2015 saw a relatively major overhaul of the MacroView DMF / Message code base to provide enhanced support for Host Named Site Collections. Previously host-named site collection support was limited to site collections in Office 365 / SharePoint Online. The release of MacroView DMF v7.9 extended host named site collection support to on-premises SharePoint servers as well.

In extending support for host-named site collections we were able to retain one of the real competitive advantages of MacroView DMF / Message, which is that the user needs only to register the web application – the MacroView software automatically discovers the host-named site collections that are present in each web application.

As part of this upgrade we added support for a new Server Type called *Client Side Only*. This is relevant to organizations wanting to implement on their on-premises SharePoint Server but in a way that is fully compatible with Office 365 / SharePoint Online.

Client Side Only option in *Servers* tab of MacroView Options dialog.

New Product – MacroView Case and Matter

Early in 2015 we launched MacroView Case and Matter. We created this new product by packaging MacroView DMF with a number of optional modules and extensions that are relevant to law firms, legal departments or indeed any organization where activity is arranged into cases:

- MacroView Unique Document Numbering
- MacroView Advanced Office Integration
- MacroView Enhanced Document Security
- *Create Matter*, *Archive Matter* and *Create New Document* extensions
- *Matter Documents Search* and *Matter Emails Search* panels

MacroView Predictive Email Filing and MacroView ClauseBank are available as optional modules.

A key element of MacroView Case and Matter is a pre-built design for a SharePoint document store. This design is based around the use of document sets, with a document set corresponding to each Case or Matter. The beauty of this pre-built design is that a new customer can be managing documents and emails with their new solution immediately after installation.

Of course if necessary, the design can be extended and customized – e.g. to capture additional metadata, to have additional search panels, to have custom right-click menu items and to change some commands and button labels. This flexibility stems from the way MacroView Case and Matter is built on MacroView DMF.
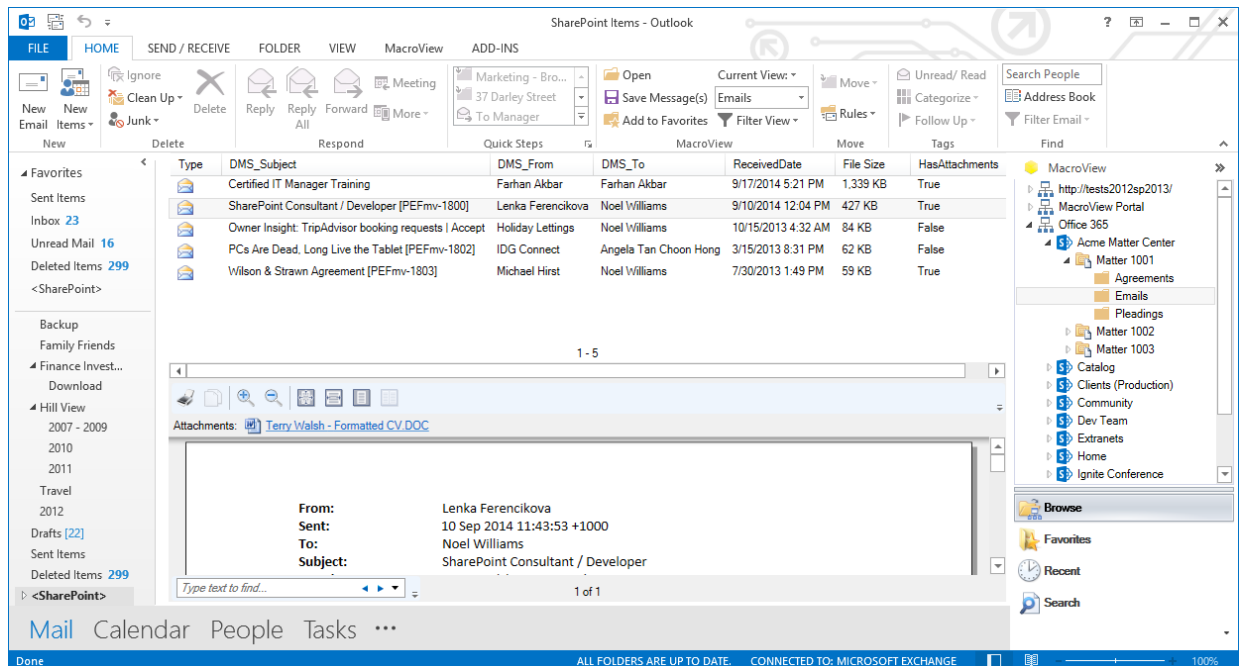
Late in 2015 we added a Smart Install module, which streamlines the installation of all the client-side components of MacroView Case and Matter.

Support for Microsoft Matter Center

Microsoft has created Matter Center to showcase how Office 365 and other Microsoft technologies can be used to store and collaborate on the documents and emails that relate to Matters for a legal department or law firm.

A Matter Center site and its document libraries and folders display nicely in the tree-view of an Office 365 tenancy that is provided by MacroView DMF / Message.

The screen shot below shows an *Acme Matter Centre* site, with a library called *Matter 1001* that contains a number of folders, including an *Emails* folder. MacroView is displaying the *Emails* view of this Matter library, and displaying a formatted preview of a selected email.

MacroView DMF running in Outlook, displaying emails that have been saved in a Matter Center by dragging and dropping.

MacroView DMF and MacroView Message can now be configured so that you can drag and drop to save Outlook emails to a folder in a Microsoft Matter Center. As part of the save, MacroView DMF / Message automatically records the attributes of the email(s) in metadata columns that are standard in a Matter Center. Other metadata such as *Matter ID, Matter Name, Client ID, Client Name, Practice Group* and *Area of Law* will also be recorded automatically.

Even if the Matter Center libraries contain only the out-of-the-box *Matter Center* content type, this allows saving and auto-recording of metadata **without prompting the user**. In other words, the metadata capture or profiling dialog is NOT displayed. This 'zero profiling fatigue' approach really helps with user adoption.

The usual other MacroView email saving features apply, including:

- You can drag one or multiple emails from any Outlook folder.

- Bulk email saved are performed in the background so you can go on working in Outlook while the save proceeds.

- Automatic naming of stored emails to prevent duplicates in any one area of the SharePoint document store.

Saved emails are marked as *Saved to SharePoint* or deleted (as configured).

See this MacroView blog post for more details.

Auto-filing Rules for Incoming Emails

For many years MacroView DMF and MacroView Message have supported the automatic filing of outgoing (sent) emails based on rules defined by each user. These rules are broadly similar to Outlook rules.

During 2015 we extended this rule-based auto-filing to include incoming emails.

If the SharePoint store has been configured so that all metadata capture is automatic, incoming emails will be saved automatically to SharePoint as they arrive in the user's InBox. To avoid users being unaware of emails that are automatically saved in this way the *Delete emails on save to SharePoint* setting is ignored.

If metadata capture is required, the MacroView profiling dialog will be displayed as the email arrives in the user's InBox and the email will be deleted from the user inbox if the *Delete emails on save to SharePoint* setting is enabled.

User Defined Tags in MacroView Predictive Email Filing

MacroView Predictive Email Filing is an optional module available for MacroView DMF and MacroView Message which makes email filing smarter. In addition to suggesting save locations for incoming and outgoing emails, MacroView PEF can recognize and use tracking tags so that the filing of subsequent emails in the same conversation requires very little or even zero user effort.
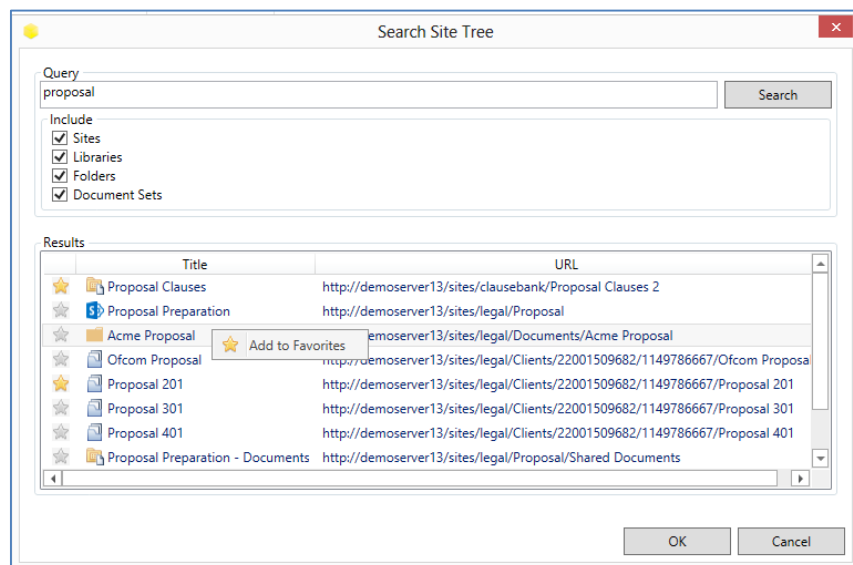
In early 2015 we added support for User Defined Tracking Tags to MacroView PEF. Typically these tags are appended to the Subject of outgoing emails by a line-of-business application running in an organization. MacroView PEF recognizes these tags and uses them to file all the emails in the conversation. MacroView PEF allows an organization to define its tracking tag format using a .NET regular expression, which enables support for almost any tag format.

Search Site Tree Even Better

In 2014 *Search Site Tree* was enhanced so that you could use it to find and locate to Document Sets and Folders, as well as to Sites and Document Libraries. Feedback was very positive – several customers told us that *Search Site Tree* was a popular way for their users to navigate, especially around a large SharePoint store.

In 2015 *Search Site Tree* has been further enhanced to make navigation even more efficient:

- You can now double-click on a result to be navigated to the corresponding node.

- Any results that are already in your list of Favorites are highlighted.

- You can now right-click a result and choose *Add to Favorites* - which saves several keystrokes.

Search Site Tree results - note existing favorites highlighted and right-click to add Acme Proposal as a new favorite

Improved Support for *Group By Views*

During 2015 we significantly improved support for Group By views in MacroView DMF and MacroView Message. As a result you can now page through a collapsed view seeing multiple heading on each page. Previously the paging was unduly affected by the number of items that would be displayed on the page if the view was expanded.

Increased Flexibility for Email Metadata Capture

As it saves an email to SharePoint, MacroView DMF and MacroView Message will automatically record all the standard attributes of an email except those that are personal. The personal columns (e.g. *Category*) can have a different value for each different user, which cannot all be recorded on the single instance of the email that will be stored in SharePoint.

Out-of-the-box MacroView DMF / Message will record email attributes in metadata columns that have specific internal names - e.g. the *To* attribute of the email is recorded in a column with the internal name *mvTo*, the *From* attribute in a column with internal name *mvFrom*, etc.

An enhancement during 2015 allows MacroView DMF / Message to be custom-configured so that the destination metadata columns can have whatever internal names you like. Other email attributes (including *Category*) can also be recorded without prompting the user.
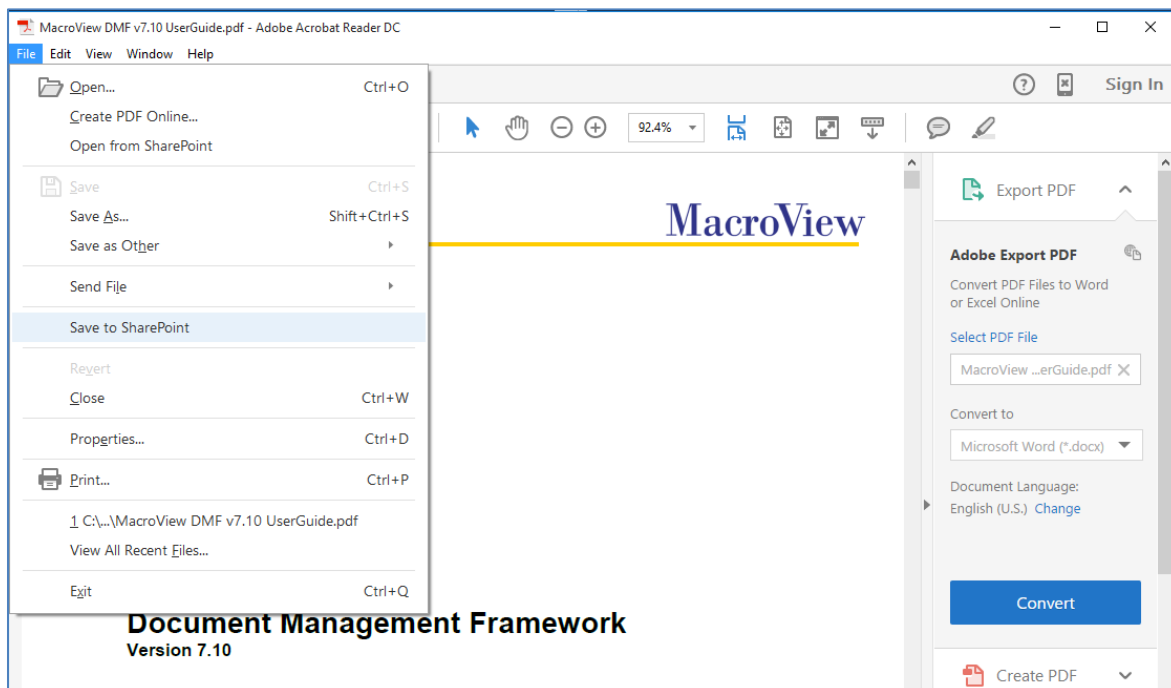
Contact MacroView for assistance with this custom configuration.

Adobe XI and Adobe DC Support

In early 2015 Adobe enabled us to add our *Save to SharePoint* customization into Adobe Reader XI. This meant that customers could take advantage of the familiar MacroView DMF UI when they wanted to save (or re-save) a PDF that they had open in Adobe Reader XI.

A new *Open from SharePoint* menu item was also added to Adobe Reader or Acrobat XI. This displays the same MacroView DMF dialogs as would be available when opening from SharePoint in Word, Excel, PowerPoint, Outlook or MacroView DMF Explorer.

MacroView DMF / Message v8, which will be released in December 2015, will provide the *Save to SharePoint* and *Open from SharePoint* menu items in Adobe Reader DC and Adobe Acrobat DC.

PDF open in Adobe Reader DC - note Open from SharePoint and Save to SharePoint menu items

Separate button for Insert Link to a File

Starting from v7.9.5000 in August 2015, MacroView DMF / MacroView Message has separate *Attachment* and *Insert Link to a File* buttons on the *Insert* ribbon of Microsoft Outlook.

The advantage of having the separate buttons is obvious if you have Versioning and Unique Numbering configured and are using DocIdReDir-style links (i.e. links that continue to work after a document is moved from where it is first stored in SharePoint). With the *Insert Attachment* button you can select a particular version of a document to insert as an attachment – this option was not available when there was only one *Insert* button, because you cannot have a link to a particular version.

Enhanced Operation with Microsoft Visio, Project and Other Applications

If you work with Microsoft Visio and / or Microsoft Project files stored in SharePoint then you will benefit from the new *Open With* command which was added to the right-click menu for the file list in MacroView DMF / Message v7.10. This new right-click option is relevant to any files that you want to open in a non-Office Windows application - such as Paint or AutoCAD.

Windows users will be familiar with the way *Open With* associates a file extension with a particular application. When you use the new MacroView *Open With* the file is opened into its application in such a way that when you save in that application, the modified file is written directly back to SharePoint. The right-click *Open* option is still available, but if you use it the modified file will be written to your C: drive, from where you will need to later upload it to SharePoint.
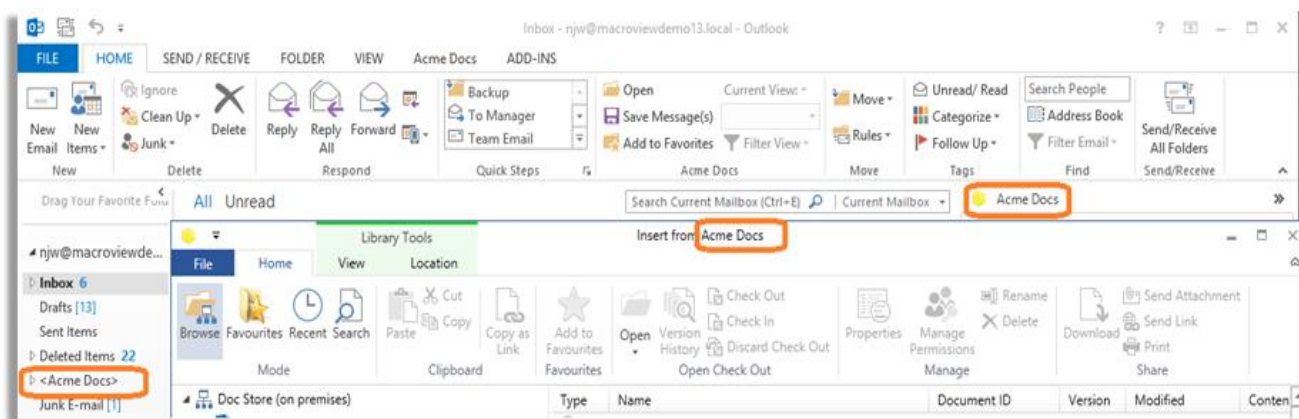
Re-Branding and Localization Support

The Localization support that was added to v7.10 of MacroView DMF and MacroView Message in November 2015 has made re-branding and similar customizations much easier. A good example of re-branding is replacing all instances of 'SharePoint' with some other term that is appropriate to an organization – e.g. 'Acme Docs'. So instead of seeing 'Save to SharePoint' and 'Open from SharePoint' users see buttons labelled 'Save to Acme Docs' and 'Open from Acme Docs', etc. Customer feedback is that such re-branding is a real key success factor in terms of adoption by users.

MacroView Professional Services can utilise the Localization mechanism to replace almost all of the labels and messages generated by MacroView DMF / Message.

An advantage of the new Localization mechanism is that it is independent of the Language support feature of MacroView DMF / Message. This in turn means that existing localizations will continue to work when a new version of MacroView DMF / Message is deployed.

This new feature of DMF also supports language specific localization so multi-language organizations can brand and configure DMF differently for each language if needed.

MacroView DMF running in Outlook 2013 - 'SharePoint' replaced by 'Acme Docs'

Support for Windows 10 and Office 2016

By the end of 2015 MacroView ClauseBank, MacroView DMF and MacroView Message will all support Windows 10 and Office 2016. This is especially important for organizations subscribing to Office 365.

In conjunction with adding support for Windows 10 we also upgraded to use .NET Framework v4.5.2. This has enabled a fresh new UI with Microsoft Fluent Ribbon elements.

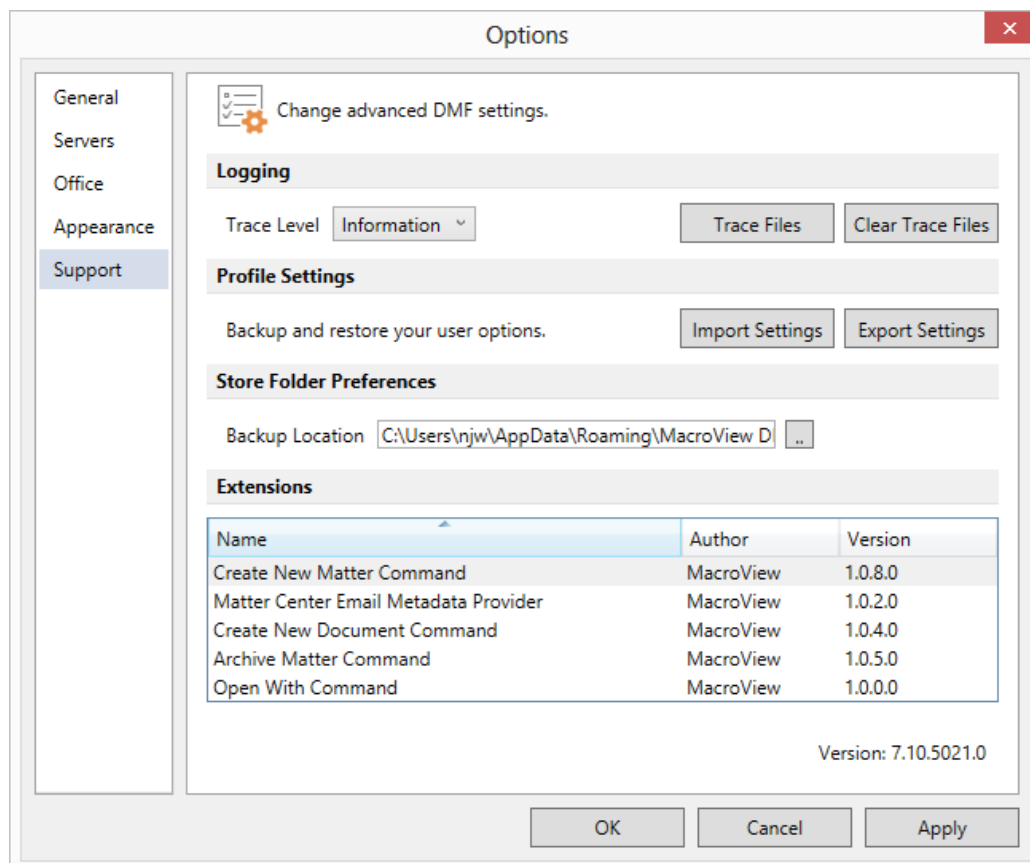## Various Enhancements to MacroView UDN, AOI

MacroView Unique Document Numbering and MacroView Advanced Office Integration are optional modules available for MacroView DMF that enable the unique numbering and version control options that users expect based on their experience with a 'traditional' DM system. During 2015 we made several important enhancements to these products:

- MacroView UDN and AOI were extended to support document libraries that have Major and Minor Versioning configured. Previously the document libraries had to be Major Versions Only.

- MacroView AOI was made available in Microsoft Excel.

- MacroView UDN and AOI were extended to support *Require checkout* libraries.

Enhanced support for right-click customizations

Creating right-click customizations now take advantage of Microsoft Extensibility Framework (MEF). The noticeable benefit of this is that you no longer need to update a Registry key in order to deploy a new right-click customization or similar extension.

We also added a new section to the *Support* tab within the MacroView Options dialog that lists the extensions that are currently installed on your PC. The version of each extension is also displayed, which can assist greatly in ensuring that your installation is up-to-date.

Support tab within MacroView Options dialog showing list of installed extensions.

Improved handling of large file uploads

In mid-2015 we changed the way MacroView DMF (and MacroView Message) handled the uploading of non-Microsoft Office files to an on-premises SharePoint Server so that there was no longer any need to specify settings in Microsoft IIS. As a result, without any custom settings, non-Office files up 175MB could be uploaded to a SharePoint 2013 Server (up to 37MB for a SharePoint 2010 Server), provided the user PC had sufficient contiguous memory available to accommodate the file plus a 30% transmission overhead.

Uploading of larger non-Office files requires the Maximum File Size setting for the Web Application to be adjusted using the SharePoint Admin Console.

Saves from Microsoft Word, Excel and PowerPoint 2010 / 2013 continued to be performed using the Cell Storage Service – i.e. the same technique used natively by these Microsoft Office applications. The Cell Storage Service breaks the document up into 'chunks'. When a document is re-saved from Office 2013 only the changes are sent to the server.

MacroView DMF v8 and MacroView Message v8 (for release in December 2015) take advantage of a new technique when uploading non-Office files to Office 2013 SharePoint Online. This technique, which is expected to be also supported in on-premises SharePoint 2016 Servers, also slices the file into chunks, so the much larger files can be uploaded.

Going forward we are looking forward to utilising a 'chunking' approach for all uploads, which will mean that much larger files can be uploaded with minimal need for adjustment of server settings and significantly reduced need for contiguous memory.

Highlighting of Files with Unique Permissions

A number of customers who had deployed the MacroView Enhanced Document Security optional module of MacroView DMF had asked for an easy to tell which files had unique permissions applying to them – i.e. permissions that were different from the default permissions specified at document library level. From mid-2015, files with unique permissions were displayed with a modified type icon. The approach is very similar to the modified icon displayed for checked-out files.

The new modified icon is also displayed for document sets and folders that have unique permissions applying to them. This makes it easy to spot a sensitive Matter (see MacroView Case and Matter, above).

A related improvement in 2015 was the introduction of a separate color setting to highlight files that are declared as records. Now three different highlight colors can be specified by a user for their MacroView file list displays:

- Checked Out

- On Hold

- Declared as Record

Type	Name	Document ID	Version	Modified	Author	
✉	Austrade_15Oct13 11.01.55_EMDG Newsletter - Oc.msg	MVLEGAL-336084598	1.0	23/11/2015 22:35		
✉	Bamboo Solutions_13Mar13 03.09.53_Attend Bamboo's I	MVLEGAL-336084385	1.0	3/11/2015 22:20		
✉	Bastiaan Brefeld_13Feb10 03.11.18_Update.msg	MVLEGAL-336081452	3.0	21/10/2015 16:05		
✉	BlackBerry_13Mar13 18.06.41_Discover an all-new.msg	MVLEGAL-336084378	1.0	3/11/2015 22:20		
📄	BlogGreatWayToManageCasesAndTheirDocuments.doc>	MVLEGAL-336082278	2.0	21/01/2015 12:47	Alison Campb	
✉	CACS-ISRM Conference 2013_13Mar13 15.12.33_Sign u	MVLEGAL-336084379	1.0	3/11/2015 22:20		
📄	CaseStudyAEGISInsuranceMacroViewDMF.docx	MVLEGAL-336082988	5.0	6/08/2015 08:07		
📄	CaseStudyMSECDMF.pdf	MVLEGAL-336082455	1.0	28/11/2014 03:43		
📄	CaseStudyPoynerSpruillDMF.docx	MVLEGAL-336082277	1.0	20/11/2014 03:44	Alison Campb	
📊	ClientProjects.xlsx	MVLEGAL-336083995	1.0	26/08/2015 20:13	Alison Campb	

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Declared as Record, Checked Out and On Hold documents highlighted in a MacroView file list

Prevent Saving of Certain Emails

MacroView DMF and MacroView Message satisfy the need that almost all organizations have for an easy way to save emails to SharePoint. However, there are some emails that organizations DO NOT want saved in SharePoint.

A good example is emails that have been archived by Enterprise Vault – what remains in Outlook is actually just a 'stub' referring to the full copy of the email that is now stored outside Exchange in a proprietary vault store. Organizations generally prefer that the full email be stored in SharePoint. If the user is attempting to save a stub they want either to warn the user accordingly, or to prevent the save from proceeding.

In late 2015 MacroView DMF / Message were extended so that custom logic can be run as an email is being saved, with the logic determining whether the email is one that should be saved. An additional setting controls whether MacroView DMF / Message displays a warning message or prevents the save.

"Smart Start" Feature for documents

Are you one of the many users who start a new document by taking an existing document and re-naming it? Recognizing the popularity of this approach, we created our new "Smart Start" capability during 2015 and are now incorporating it in our custom template solutions. "Smart Start" allows you to easily and SAFELY re-use the variable details and existing content in a previous document, which makes the preparation of new documents more efficient. "Smart Start" is also relevant to document migration and/or template conversion projects.

Performance, Stability and Memory Usage Improvements

Throughout 2015 a major focus has been on continual improvement in performance. Some of the results are:

- The move to .NET Framework 4.5.2 (see Support for Windows 10, above) provided a noticeable improvement in the performance of the MacroView DMF / Message UI.

- In July we improved the operation of server side caching in environments with multiple Web Front End servers. This enabled better performance for a number of large implementations.

- In October we improved performance when saving multiple emails to Office 365 / SharePoint Online and Client Side Only servers.

There has also been a significant effort around improving stability – particularly to reduce the incidence of crashes in Outlook when MacroView DMF is in use. To that end we have reduced memory usage by the MacroView DMF local service in a number of areas. An example is the writing out to disk of Favorites and Recents, which now uses significantly less memory.

Faster Downloads of MacroView Software

During 2015 we adjusted the secure download sites for MacroView software so that the software components were hosted on Amazon, rather than on the MacroView servers. This has allowed much faster downloads of MacroView software, particularly by customers in UK and Europe.

More Information

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

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This blog has been published as:

http://www.macroview.com.au/blog/archive/2015/12/18/macroview-2015-highlights.aspx