

## How MacroView Enables ECM Solutions on SharePoint & Office 365

You are looking to create an Enterprise Content Management solution for your organization. The budget is tight and of course you want user adoption to be high. You are also well aware of the rapid pace of change and of the need to disrupt conventional thinking in order to have a new solution that will allow the business to take advantage of new technology, rather than be a victim of that change.

SharePoint can be a good platform choice for a new ECM solution that scores well on the success criteria of cost effectiveness, user adoption and technology change adaptation. This blog describes a number of successful ECM solutions that have been created by combining SharePoint (both on-premises and SharePoint Online) with MacroView software. In each of these examples MacroView has been used to overcome the limitations in the functionality and user experience that SharePoint provides out-of-the-box, thereby allowing the advantages of the SharePoint platform to be realised.

### Document Management

Document Management is a type of ECM solution that is relevant to a very wide range of organizations. In the ECM context Document Management solutions involve more than just storing and retrieving documents – they typically also capture and use metadata in order to allow more efficient finding of documents. The last 20 years have seen the emergence on the market of a number of well-known document management systems. These ‘traditional’ DM systems support searching for documents based on metadata and / or content, as well as additional functionality such as unique document numbering, check-in /check-out, versioning, auditing and document-level security. Generally these traditional DM systems provide good integration with Microsoft Office applications.

From a distance, SharePoint looks like it matches traditional DM. SharePoint natively supports the storing of and searching for documents, where ‘document’ can be almost any type of file. SharePoint supports all the usual DM features - capture and use of metadata, unique numbering, check-in / check-out, versioning, auditing, etc. SharePoint comes with integration into Word, Excel and PowerPoint.

In a number of ways SharePoint offers more than traditional DM systems. It is web-based, which facilitates access from anywhere and also integration with other applications – to save a document to SharePoint or open a document from SharePoint you just need its URL. With Office 365 / SharePoint Online Microsoft is focussing on making it easy to collaborate on documents from any type of device including mobile devices. SharePoint Online also makes it easier to set up extranets for collaborating with your customers and service partners.

#### Overcoming the DM Limitations of SharePoint

However, as is often the case, the devil is in the detail. SharePoint might provide all the usual DM features, but it does so in a way that is different from and in many cases not as functional as the traditional DM systems. The integration between SharePoint and Office applications is significantly less user-friendly than with a traditional DM system. And the out-of-the-box viewing and navigation experience, combined with various limits means that out-of-the-box SharePoint does not work well with large document stores.

MacroView plugs the functionality and user experience gap, enabling organizations to take advantage of the SharePoint platform, including the new web-based, from-anywhere-on-any-device collaboration capabilities. This makes DM solutions based on SharePoint + MacroView a very attractive alternative to traditional DM systems and also to the file share-based approaches that are still in use by many organizations.

Here are some examples of how MacroView ‘plugs the gap’:

- By displaying an intuitive tree-view of the SharePoint document store, which makes working with SharePoint feel as familiar as working with a folder structure in Windows Explorer or Outlook.

- By providing efficient, user-friendly ways to navigate around an arbitrarily large SharePoint document store.
- By numbering documents sequentially across the whole document store, and automatically updating the footers of Office documents so that they display the unique Document ID and other reference information, such as current Version number.
- By providing user friendly version-control options on closing a document that you have checked-out from SharePoint saving users from inadvertently discarding all their changes.
- By letting users search for documents based on metadata and content while they continue to work in Outlook, Word and other familiar Windows apps.
- By providing excellent integration between Outlook and SharePoint (We'll explore this in more detail later in this blog post, when we look at Email Records Management).

### Legal Document Management

Law firms are noted as being serious users of Document Management systems. Leading UK law firm Shoosmiths has successfully replaced their previous traditional DM system with SharePoint 2013 + MacroView. As Shoosmiths IS Director, Shane Smith notes:

*"MacroView has delivered the functionality to bridge the gap between native SharePoint DMS functionality and what is required in a legal environment."*

Essentially MacroView has enabled Shoosmiths to use SharePoint as the platform for all their document storage. They have integrated their SAP-based practice management system with the SharePoint document store, with the result that all the documents related to a matter are now in a single, securely shareable location. This in turn is opening up opportunities for new and improved services.

Law firms looking to use Microsoft Matter Center as a way to collaborate on documents with their clients will appreciate the way MacroView is supporting drag and drop saving of emails to Microsoft Matter Center, without the user being prompted for any metadata. MacroView DMF users can also drag and drop to move or copy documents and emails between on-premises SharePoint and Office 365 tenancies (including the Microsoft Matter Center).

### Email Records Management

Most organizations have a need to better manage their emails. Because emails are not meant to be edited, solutions for managing emails should be regarded as records management solutions – once saved the emails should be protected from editing and accidental deletion for an appropriate retention period.

A major Canadian energy utility was seeking a Records Management solution for their non-confidential emails. The utility is a large organization with significant email volumes. Having evaluated a range of records management systems they chose to implement a solution based on a combination of SharePoint and MacroView Message. They found that this was a cost effective way to satisfy their email records management needs.

The solution was easy to use – a user at the energy utility wanting to declare an email simply dragged and dropped that email to a special folder that appeared in their Outlook folders area. The MacroView software automatically recorded the standard attributes of the email as metadata, prompting for additional custom metadata. The saved emails were automatically routed to the correct document library. As part of the routing, permissions were automatically adjusted so that end-users could not modify or delete the saved email.

MacroView customised the metadata capture dialog so that it was easy to select values for a 4 level classification scheme. The classification scheme was highly detailed, with well over 10,000 valid values. The resulting classifications complied with the utility's requirements for record keeping and discovery.

Staffers could use the normal features of MacroView Message to handle tasks such as searching for, previewing and opening the saved emails. MacroView Message was also used to store other emails and attachments in SharePoint.

This energy utility implementation is a good example of how by enhancing and extending the integration between Microsoft Outlook and SharePoint, MacroView software enabled SharePoint to be used to implement an enterprise-grade records management solution.

Other records management needs can be addressed using SharePoint – either by using the native Compliance features available in out-of-the-box SharePoint Server or by using one of the many third party records management add-ons – such as from Collabware, Gimmel or RecordPoint. In these scenarios MacroView software can assist by providing a user-friendly way to save documents and emails into SharePoint.

## Management of Re-Usable Document Content

A type of ECM system that is vitally important to some organizations is a system for managing the content that is available for re-use by staff in the documents that they are preparing. The content might be standard, approved text and graphics for inclusion in Word documents or Outlook emails. It could also be slides or sets of slides for inclusion in PowerPoint presentations. The objective of such content management solutions is to make the preparation of documents, emails and presentations both faster and safer.

A major international law firm is using MacroView ClauseBank to effectively manage their re-usable document content in SharePoint. The firm was already using SharePoint as the platform for their successful global intranet. ClauseBank uses SharePoint as a central store for re-usable content items. Each item is a document in a specially configured SharePoint document library.

A popular use of ClauseBank at the firm is to manage a central bank of CVs, which are then inserted into responses to tender requests and other proposals for new work. Of course ClauseBank is also used by lawyers and paralegals as they draft deeds and agreements and other legal documents.

The key success factors for MacroView ClauseBank are its accessibility and ease of use. ClauseBank adds a custom group to the *Insert* ribbon in Microsoft Word, Outlook and PowerPoint. Simply clicking a button displays a menu of available content items, arranged in a hierarchical fashion that reflects the business activities of the firm. The user can view a fully formatted preview of each content item.

Selected items are retrieved from SharePoint and inserted at the current cursor position in the document, email or presentation that they are drafting. The inserted items retain all their formatting styling, with the result that they automatically comply with the firm's corporate style standards.

### Keeping the Content Up-to-date and Relevant

A point of weakness for many ECM solutions of this type is that it is difficult to keep the content up-to-date and relevant causing the usage of the central content store to rapidly fall away. MacroView ClauseBank overcomes this issue by allowing users to propose new content items by simply selecting some text and clicking a *New Clause* button while they work in Microsoft Word. No need for specialist skills with a content management system!

MacroView ClauseBank also helps to ensure the ongoing relevance of the central content store by preventing the re-use of out-of-date content items. Each content item can have metadata recorded for it so that ClauseBank can automatically determine an Expiry Date. As the item nears its Expiry Date ClauseBank automatically sends an alerting email to the Content Expert for that item. The Content Expert (a Person or Group in the SharePoint environment) then reviews the item, which automatically extends its Expiry Date making it available for selection again.

### Ease of Deployment

Deployment is a critical issue for any global firm and the way MacroView ClauseBank can run with any level of SharePoint is important in this regard. Initially the firm

implemented ClauseBank in their on-premises SharePoint Server farm. When some of their more remote offices experienced slow download performance (because of low speed internet connections), the firm took advantage of how MacroView ClauseBank can be implemented using SharePoint Foundation. Because SharePoint Foundation is a no-cost install for any Windows server, this meant that the remote offices could have their own SharePoint environment with no additional cost for SharePoint licenses. The performance when accessing the local SharePoint Foundation server was excellent.

Going forward the firm has the option of implementing MacroView ClauseBank on Office 365 / SharePoint Online, and of using nested folders in SharePoint libraries to implement the hierarchical taxonomy of content items. MacroView ClauseBank allows the SharePoint folders to be nested at any depth, which provides useful flexibility in structuring the taxonomy to reflect the requirements of the some business units within the firm.

User PCs can run Office 2010, 2013 or 2016. This flexibility permits staged deployment, which is very important given the number of user PCs and their wide geographic distribution.

In a nutshell, MacroView ClauseBank is enabling the extended application of SharePoint – beyond intranets to the management of re-usable content.

## Integrated Solutions for Customer and Project Management

Let's look at ECM solutions where the content is being managed in order to improve the business processes around delivery of services to a customer or projects for a customer. The key word here is 'integrated' – multiple systems need to work together to provide better service delivery.

One way to achieve this is to have the content stored in the database that underpins a line of business application, and to have other applications access that database. A better way can be to have all the applications access and update the content in a central SharePoint store.

This SharePoint-centric approach works because SharePoint is relatively open environment – applications can save and open documents in SharePoint simply by using a URL. For example a line-of-business insurance administration system can save the policy documents that it generates, or a practice management system such as the SAP-based one at Shoosmiths can store the compliance documents that it generates in the course of opening a new client matter.

Almost always there is a need to be able to view existing documents and save additional ones from Microsoft Outlook and perhaps other Office applications. This is where MacroView Message and MacroView DMF can play a role.

Both these MacroView products come out-of-the-box with excellent integration in Microsoft Outlook. MacroView DMF extends that experience to Word, Excel, PowerPoint, Adobe Reader / Adobe Acrobat and Windows. While working in these familiar applications a MacroView user can:

- navigate the SharePoint document store
- view the contents of libraries, document sets and folders
- see formatted previews of already stored documents and emails
- search across the SharePoint store based on metadata and content
- retrieve documents to open or insert as attachments to new emails
- drag and drop to save additional emails, attachments and other files
- etc.

Having all that functionality pre-built can really reduce the amount of effort associated with creating a new integrated content management solution for client or project management.

Engineering and construction firms make heavy use of PDFs and appreciate the way they can save to SharePoint direct from Adobe Reader and Adobe Acrobat. The save is done with full metadata capture and versioning support. When an existing

document is re-saved, existing metadata is re-used by default, which further reduces user effort.

These and many other MacroView customers will like the new *Open With* command, which allows documents such as from Visio and Project to be opened in such a way that changes are saved straight back to SharePoint – i.e. there is no need to re-upload a modified document to SharePoint.

As some MacroView customers have noted, viewing the tree-view display provided by MacroView was the first time they really understood how their line-of-business system was storing files in SharePoint. The message here is that business users like to be able to work with their documents and emails from Microsoft Office.

### Extending and Customising to Meet Requirements

MacroView products are designed to be readily extensible, which is another big plus when you want to make them a component of an integrated overall solution. Here are some examples from actual implementations:

- An insurance company created a custom *Underwriting Search* panel so that their underwriters could search for documents and emails using relevant metadata.
- An employer services company had the MacroView profiling (metadata capture) dialog customised to have a button that a user could click to add a new record for a new customer or customer project to an external CRM system;
- A legal department had a *Create New Document* option added to the MacroView right-click menu so that a user could conveniently select the appropriate template to create a new document and have it automatically saved and profiled in the SharePoint area that they had right-clicked.
- A law firm had the MacroView Push Favorites mechanism configured so that it would automatically create favourites for each user, corresponding to the projects to which that user had been assigned as a timekeeper in the Project Management System.
- A property investment services company commissioned a custom *Workflow* option to be added to the right-click menu so that a user could conveniently advance a document to the next stage of a workflow.
- A semi-government authority utilised the DMF protocol handler so that clicking on a hyperlink in the record for a Project in a line of business system would trigger MacroView DMF Explorer to be load and navigate to the area corresponding to that Project.

The take-home summary is that MacroView facilitates the creation of integrated ECM solutions based on Microsoft SharePoint – you can take full advantage of the capabilities of SharePoint and at the same time provide the functionality and experience that users require.

### Next Steps

[Contact MacroView](#) for more information about MacroView software and how it can play a role in creating an effective Enterprise Content Management solution for you organization.