

MacroView DMF™
Document Management Framework
Version 9

Installation and Configuration Guide

June 2025

Purpose of this document

This document is a guide for Administrators responsible for the installation and maintenance of MacroView Document Management Framework (MacroView DMF) and its associated modules:

It can also be used for installation and maintenance of MacroView Message¹.

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¹ MacroView Message is the subset of MacroView DMF that runs in Microsoft Outlook.

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1. Introduction

This Installation and Configuration Guide applies to:

- [MacroView DMF](#) and [MacroView Message Client](#) version 9 and [Server](#) version 8
- [MacroView DMF 365](#) and [MacroView Message 365](#) version 9

[MacroView DMF](#) and [MacroView Message](#) are relevant to organizations using on-premises SharePoint servers. [MacroView DMF 365](#) and [MacroView Message 365](#) are relevant to organizations wishing to use only SharePoint Online / Office 365 Tenants – i.e. they do not allow use of on-premises SharePoint servers.

References to [MacroView DMF](#) in this Guide include [MacroView Message](#), [MacroView DMF 365](#) and [MacroView Message 365](#) where applicable.

Microsoft SharePoint® 2013, 2016, 2019 and SharePoint Online provide a range of functionality for storing and managing documents, emails and other files. [MacroView Document Management Framework v8.7 \(MacroView DMF\)](#) extends the document management capabilities of SharePoint by dramatically improving the integration with SharePoint of Microsoft Office®, Microsoft Windows®, Adobe Reader® and Adobe Acrobat®.

[MacroView DMF](#) 'stands on the shoulders' of Microsoft SharePoint, in that it does not change how files or their metadata are stored in SharePoint. What [MacroView DMF](#) does do is improve the user experience of SharePoint as a document and email management platform.

1.1 Full-Function Document Management

[MacroView DMF](#) enables the creation of document management solutions that have the features offered by a traditional document management system, but which also have the added functionality and cost effectiveness of SharePoint.

A key feature of [MacroView DMF](#) is its tree-view display of the hierarchical structure of a SharePoint document store. That [DMF](#) tree-view is available where you work – e.g. in Microsoft Outlook, Microsoft Word, Adobe Reader.

The tree-view makes visualizing and navigating a SharePoint document store as familiar and intuitive as viewing and navigating a File Share with Windows Explorer or an Outlook folder structure. This tree-view makes it much easier for users to move to SharePoint from previous file and email management environments.

A real strength of [MacroView DMF](#) is its excellent support for metadata in SharePoint. As it saves documents, messages and other files to SharePoint, [MacroView DMF](#) consistently captures metadata (profiles), thereby ensuring flexible, successful searching using SharePoint Search.

1.2 Email Management

The excellent integration of [MacroView DMF](#) with Outlook means that [DMF](#) is the best-available tool for SharePoint-based email management solutions. Thanks to that same integration you can use Outlook as the user-interface for general document management tasks – not just email management.

[MacroView Message](#) is the subset of [MacroView DMF](#) that runs in Outlook and which offers a cost-effective alternative for organizations that are looking just to manage their email messages in SharePoint.

1.3 Usage and Operation

See *MacroView DMF User Guide* for information on usage and operation of [MacroView DMF](#) and [MacroView Message](#).

2. Technical Requirements

2.1 SharePoint Versions / Office Versions / Operating Systems

2.1.1 SharePoint Online (Office 365)

MacroView DMF supports SharePoint Online (Office 365). When using SharePoint Online there is no MacroView DMF server component installed. See Section 2.3.1 for details for more information.

2.1.2 SharePoint² 2016 or 2019 Support

MacroView DMF supports Servers running SharePoint 2016 and 2019 Server.

MacroView DMF can also be used in Client Side Only mode with on-premises SharePoint 2016 and 2019 farms. When using client side only mode there is no MacroView DMF server component installed. See Section 2.3.1 for more information.

2.1.3 Office and Operating System Support

At the Client MacroView DMF supports Microsoft Office³ 2019, 2016 and Office365/Click-to-Run Office running under Windows 10 Anniversary Update or higher and Windows 8.1.

2.2 Workstations

MacroView DMF Client can run on workstations with:

- Microsoft Windows 10 Anniversary Update or higher/Windows 11 (64 bit recommended)
- Microsoft Office 2016 or 2019 (x86 or x64), Office365/Click-to-Run Office
Note that the MacroView Message and MacroView DMF software is NOT compatible with the so-called Store version of Microsoft Office.
- NET Programmability for Microsoft Office (aka PIAs)
- Microsoft .NET Framework v4.8
- Visual Studio Tools for Office (VSTO) 4.0 Runtime
- Microsoft Edge WebView2

Note: running DMF/Message in conjunction with another Document Management product is not a supported scenario.

For detail of version support refer to the following Helpdesk article.

<https://support.macroview.com.au/hc/en-us/articles/235722207-SharePoint-Office-Windows-and-Adobe-version-support>

2.3 Servers

MacroView DMF Server can run on servers with the following supported versions of SharePoint:

- Microsoft SharePoint Server 2016
- Microsoft SharePoint Server 2019

Note: Client Side Only mode requires SharePoint 2016 or later.

You should always ensure that the server and client versions are part of the same service release. For example when you download a new version of the client you will also need to obtain and install the corresponding server release.

Note: It is not possible to install the MacroView DMF server component on SharePoint Online/Office 365.

² MacroView DMF and Message 8.5.1054 is supported on SharePoint 2010. MacroView DMF and Message 8.5.1074 and later are not supported on SharePoint 2010.

³ MacroView DMF and Message 8.8 and later are not supported for Office 2010.

2.3.1 **SharePoint Online (Office 365) servers and Client Side Only mode**

When using [MacroView DMF](#) or [MacroView Message](#) with Office 365, or in Client Side Only mode, no DMF server component is required. Simply install the [MacroView DMF](#) or [MacroView Message](#) client software and activate the license.

In order to use [MacroView DMF](#) or [MacroView Message](#) to access SharePoint Online (Office 365) tenants or on-premises servers using *Client Side Only* mode, organisations first need to associate their MacroView license with their SharePoint Online (Office 365) tenant or on-premises server farm via the [MacroView Licensing Website](#).

[MacroView DMF](#) and [MacroView Message](#) licenses permit installation on up to three server farms or a combination of up to three server farms and SharePoint Online (Office 365) tenants with each SharePoint Online (Office 365) tenant constituting one installation depending on the licenses purchased.

Organisations wishing to use existing on-premises [DMF](#) or [Message](#) licenses with SharePoint Online (O365) should contact [MacroView Services](#) for assistance with licensing and activation.

2.4 **Important information about this release**

When performing an upgrade of [MacroView DMF](#) the server must always be updated prior to any of the clients. Running an old server version with a newer client is definitely not recommended. Unexpected results and errors will occur.

2.4.1 **MacroView Predictive Email Filing (PEF)**

Use of [MacroView Predictive Email Filing](#) with [MacroView DMF 8.7](#) or [MacroView Message v8.7](#) requires that [MacroView PEF](#) server v5.5 or later is installed.

2.4.2 **MacroView AOI/UDN**

If you are running [MacroView AOI/UDN](#), [MacroView DMF v8.8](#) and [MacroView Message v8.8](#) require [MacroView AOI/UDN](#) server v6.2 or later to be installed.

2.4.3 **Upgrading MacroView DMF Client**

When upgrading from DMF Client v7.9.5054 through v7.10.34 the DMF local service must be shut down before installing the new client to ensure unsaved *Recents* and *Favorites* are retained.

3. MacroView DMF Server – New Installation

3.1 Summary (Checklist)

- Read the Important information about this release section 2.4 of this document.
- Ensure that the essential environment prerequisites are in place.
- Add & Deploy the [MacroView DMF Solution](#).
- Activate the [MacroView DMF License](#).
- Activate [MacroView DMF Search](#) feature on all web applications
- Create sample libraries using [MacroView Library Templates](#).

3.2 Essential environment prerequisites

For correct operation of [MacroView DMF](#), **'Allow Anonymous' must NOT be enabled**. By default in a SharePoint installation 'Allow Anonymous' is not enabled for the SharePoint Web Application. Should you require anonymous access then create a secondary web application in SharePoint which extends to the same Content Store.

Users must have a minimum of **Read access** permission to the root site collection for each web application and/or tenant they wish to use with [MacroView DMF](#). For example, if a Web Application has the URL <http://sp2019> then the root site collection <http://sp2019/> must be valid and readable by the user.

The Application Pool Account for the SharePoint content store will require write access to the location specified in the 'TEMP' System environment variable on your SharePoint Server Windows. By default this path will be C:\Windows\TEMP. This path is used when copying/moving files between SharePoint servers using [MacroView DMF](#).

3.3 Upgrading from a previous server version of MacroView DMF

Due to new features that have been added to the [MacroView DMF WSP](#), you are required to fully retract and remove any previous version of the [MacroView DMF WSP](#) prior to adding and deploying this new version. In order to accomplish this, follow the steps in Section 4. Note that all [MacroView DMF](#) clients must also be updated to work with the new Solution.

See Section 4 for upgrade details.

3.4 Add & Deploy the MacroView DMF Solution

[MacroView DMF](#) uses a custom .NET web service to extend the document management capabilities of Microsoft SharePoint. This custom web service and other [MacroView DMF](#) Server components are shipped as part of a SharePoint Solution. This Solution needs to be added, deployed and activated.

3.4.1 Server Farm with Multiple Front-End Servers

In cases where there are multiple front-end web servers in the server farm, the [MacroView DMF](#) Solution can be installed on any front-end server. Once deployed, the [MacroView DMF](#) Feature will automatically be available on all SharePoint Servers in the Farm.

3.4.2 Installation Start

Log on to the server as a Farm Administrator.

Note that a Domain Administrator MAY NOT be a farm Administrator.

Run the SharePoint (PowerShell) Management Shell as administrator.

3.4.3 Add the solution

On the SharePoint server:

- Unzip the 'MacroViewDMFServer.zip' file to the c:\temp folder on the SharePoint server.
- Execute the following commands:
 - Add-SPSolution -LiteralPath "c:\temp\MacroView DMF.wsp"
Add-SPSolution (PowerShell) is appropriate with SharePoint 2013 and above. (Note: *stsadm* is now deprecated.)

3.4.4 Deploy the solution

The solution can be deployed from Central Administration or via the SharePoint Management Shell.

To deploy from Central Administration:

- Launch the SharePoint Central Administration Console
- On SharePoint Server 2016 or 2019 select System Settings and then select Manage Farm Solutions under the Farm Management heading.
- Within the *Solution Management* page select 'MacroView DMF.wsp' and deploy the MacroView DMF Solution.
- Select a convenient time to deploy the solution.

To deploy via PowerShell:

- Install-SPSolution -Identity "MacroView DMF.wsp" –GACDeployment

3.5 Activating your MacroView DMF On-Premises License

For information on activating your MacroView licenses for use with Office 365/SharePoint Online or Client Only Mode refer to section 6 of this document.

MacroView licenses are managed by a MacroView License Activation web service running on a central MacroView server. Before it can be used from a client workstation the newly installed MacroView DMF web service must be activated.

You would have been provided with a License Key for MacroView DMF along with the download details which you must enter in Central Administration. Evaluation License Keys will expire 45 days from the date the License Key was sent from MacroView. Following payment for licenses or license renewal you will need to activate your MacroView DMF license again as per this Section. This will extend this Expiry Date.

Note that the licence must be renewed annually. If the licence is not renewed the software will cease to operate.

There are different activation methods depending on whether the server has internet connectivity or not.

3.5.1 Online License Activation

- Open the SharePoint Central Administration console.
- On SharePoint Server 2016 or 2019 select *System Settings* and under *MacroView Licensing* click on *Manage product licensing*.
- Click Online Activation.
- Enter your License Key and click *Next*.
- Select your Product (MacroView DMF) and click *Finish*.

If your SharePoint server has Internet connectivity, the MacroView Activation feature will automatically connect to the MacroView License Activation web service, send details of your installation and collect your unique license activation key.

The MacroView Activation feature will record license key details in the configuration database for the SharePoint Farm. The license key contains (in

encrypted form) your “Customer Details”, “License Expiry Date” and “Licensed Seat Count”.

3.5.2 Offline License Activation

If your server fails to activate using the Online Activation method then, on a computer with internet connectivity, navigate to <http://www.macroview.com.au/licensing>.

On this page, you will need to enter your License Key and upload the Activation Request file.

You will be prompted to save a License (XML) file. This file can then be uploaded into the “License Activation” page in Central Administration to complete the activation process.

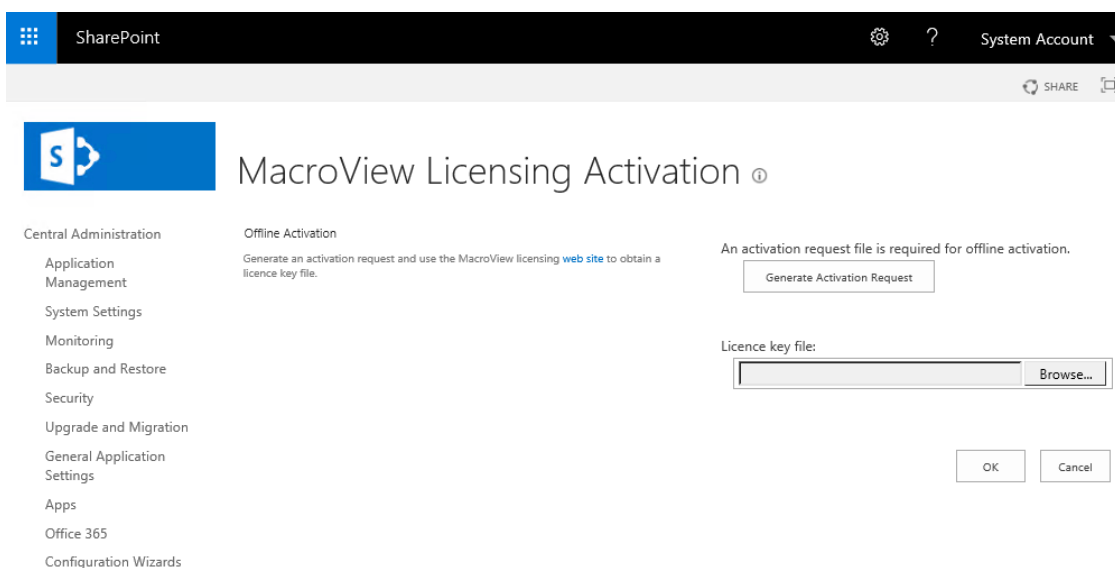


Figure 1: MacroView License Activation Page - Upload

3.6 Activate the *MacroView DMF – Search* feature

*Make sure that you activate on the correct **Web Application** – the one containing the content that you wish to search.*

MacroView DMF allows you to perform Keyword and Email metadata based searches from within Outlook or *MacroView DMF Explorer*. This functionality requires that you have SharePoint Server 2013, 2016 or 2019 and will not work with SharePoint Foundation 2013. Note that searches will not return results unless you have performed a full crawl on your search server after you have activated the *MacroView DMF – Search* feature.

To enable this functionality, you must activate a feature on your web application from SharePoint Central Administration.

In SharePoint 2013, 2016 and 2019 navigate to *Application Management* and click on *Manage web applications*. On this page select a Web Application and click on *Manage Features* in the Ribbon.

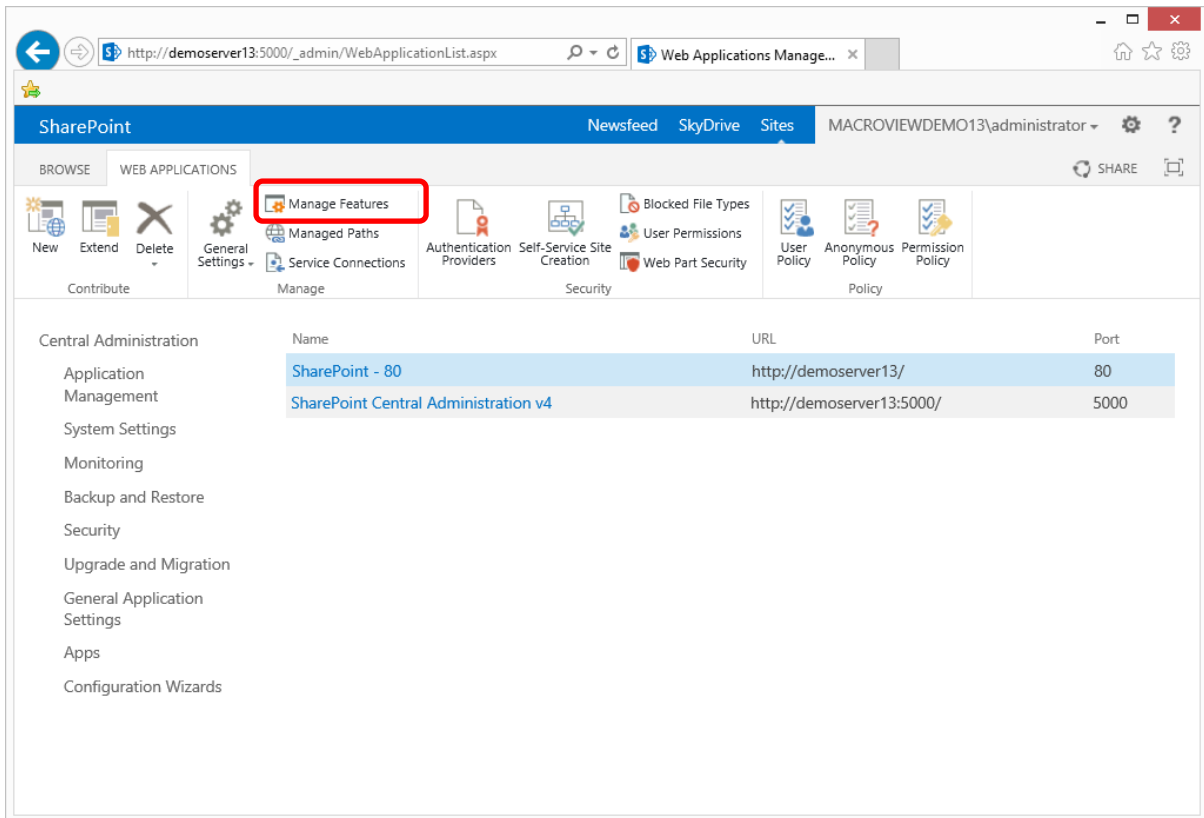


Figure 2: Manage web applications page - Manage Features button highlighted.

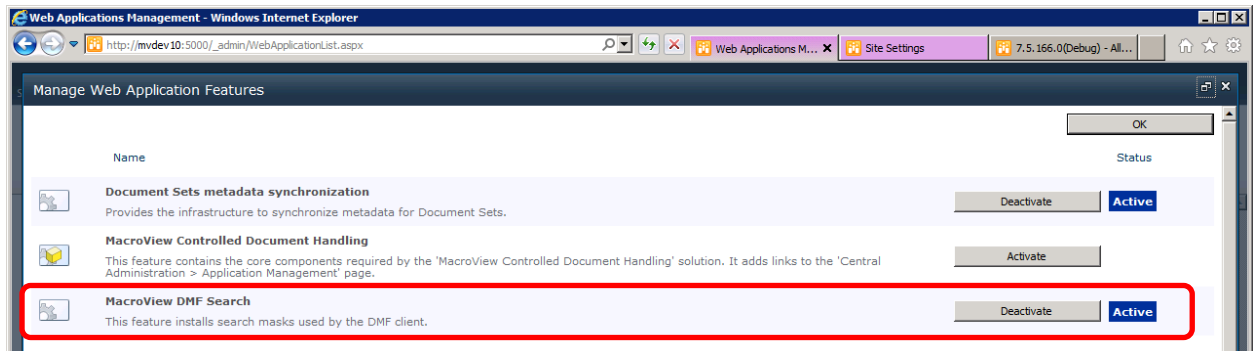


Figure 3: 'MacroView DMF – Search' feature is activated

3.7 Create Sample Libraries using MacroView Provisioning

MacroView Solution Provisioning allows users with appropriate permission to create site collections, sites and libraries that are configured with the columns, content types and library views suitable for use with MacroView DMF or MacroView Message.

See this [article](#) for more information

3.8 Create Sample Libraries using MacroView Library Templates

There are many approaches that can be taken when creating document libraries in SharePoint. [MacroView DMF](#) includes sample list template (STP) files (automatically deployed by activating the [MacroView DMF Libraries](#) feature for a site collection) as these provide a simple and intuitive way of demonstrating the capability of MacroView software.

3.8.1 The sample library templates

Included in the [MacroView DMF](#) Solution are two *sample* English document library templates (see section 3.8.4 to activate these features):

- MacroView Library
- MacroView Library – One Content Type

These templates illustrate a variety of techniques relevant to creating ‘best practice’ document management solutions in SharePoint.

These templates contain the custom columns that MacroView DMF can set automatically as it saves an email to SharePoint. These custom columns are:

■ ConversationTopic	Single Line of Text
■ Subject	Calculated
■ To	Single Line of Text
■ From	Single Line of Text
■ CC	Single Line of Text
■ BCC	Single Line of Text
■ SentOn	Date and Time
■ ReceivedTime	Date and Time
■ Importance	Single Line of Text
■ Attach Count	Single Line of Text
■ Attachments	Calculated (Yes/No)
■ Sensitivity	Single Line of Text
■ MessageID	Single Line of Text
■ Tracking Tag	Single Line of Text
■ Original Author	Single Line of Text
■ Original Created	Date and Time
■ Original Modified	Date and Time
■ Original Producer	Single Line of Text
■ Original FileName	Single Line of Text

MacroView DMF will automatically populate these columns if they already exist in a destination Document Library. These columns can be added at any time directly to a Library or to the Site Columns Gallery.

With regard to the **'Subject'** column:

- **'Subject'** automatically displays the ConversationTopic. ConversationTopic is the Subject without any RE: or FW: prefixes. This enables the SharePoint user to group emails by Conversation Topic (discussion thread) when sorting by Subject (same effect as standard Outlook).
- When saving an email MacroView DMF will also automatically set the built-in 'Title' column to the Subject of the email.
- **'Tracking Tag'** stores the tag assigned to emails by MacroView Predictive Email Filing (if enabled).

The last five columns listed above are designed to capture the properties of a file before it was uploaded to SharePoint.

- **'Original Author'** is set to the 'Author' property of the file before it was uploaded or the sender of an email.
 - **'Original Created'** is set to the date and time that the file was originally created.
 - **'Original Modified'** is set to the date and time that the file was last modified before being saved to SharePoint.
-

- **'Original Producer'** is only used for PDF files and is set to the program used to create the PDF file.
- **'Original FileName'** is used for Office documents, PDF files and popular text file formats including TXT, XML and HTML and is set to the original name of the file when it was first saved to SharePoint.

All the columns should be added as 'hidden' columns to a content type so they do not appear in the profile dialog along with the other metadata columns.

The MacroView Library templates also contain pre-defined Views for *Word Documents*, *Excel Workbooks*, *PowerPoint Presentations*, *PDF Documents* and *Emails*.

The *Emails* view provides a very user-friendly means of viewing emails that are stored in SharePoint by **MacroView DMF**. It contains a *Subject* column, which is a hyperlink to the email (i.e. just click on *Subject* to open the message) and which also has a right-mouse click menu for editing the properties of the message.

MacroView strongly recommends that any document library that will be used in production be created using site columns and/or site content types. DMF and Message will automatically populate the site columns in your content types that come from those site columns added when activating the **MacroView DMF Site Columns and Content Types** site collection feature.

One reason for this recommendation is that while the supplied sample libraries will work, their metadata will not be centrally managed. This may create an unnecessary amount of maintenance effort, especially in a large SharePoint environment.

For assistance in designing your sites and libraries to your precise requirements contact MacroView Professional Services (solutions@macroview365.com).

3.8.2 **Email Properties Greater Than 255 Characters**

Note that *To*, *CC* and *BCC* are initially defined as 'Single Line of Text' columns. **MacroView DMF** will also automatically update these columns if they are defined as 'Multiple Line of Text'. For any Multiple Line of Text column, you should also enable the *Allow unlimited length in document libraries* attribute.

The 'Multiple Line of Text' format allows the storage of long addressee lists, but precludes the use of the column in Sorting and Filtering operations. This is a standard constraint with SharePoint.

Note also that the custom columns related to emails are by default only visible in the Emails view.

3.8.3 **MacroView Library Conversion Utility**

MacroView can supply a utility program that converts the structure and contents of an existing Document Library to be the same as if the Library were always based on a MacroView-supplied sample Library template.

Following use of this utility a Document Library will have the same columns as those in the sample MacroView-supplied Library templates. The files in the Library will also be converted to be as if they were saved using **MacroView DMF**.

Contact MacroView Services (services@macroview365.com) for details about this utility.

3.8.4

Deploying the MacroView DMF Libraries, and MacroView DMF Columns and Content Types Site Collection Features

Reminder: The *MacroView DMF Libraries* feature adds sample Library Templates. While these features show some aspects of library design for best practice document management with SharePoint and *MacroView DMF*, ideally you should build up your site content types using the site columns added with the *MacroView DMF Columns and Content Types* feature (see above).

The *MacroView DMF Columns and Content Types* feature adds the site columns that you can use for designing your own libraries, list definitions and content types.

These features must be activated for each Site Collections that needs them:

- Ensure that you are logged in as a Site Collection Administrator.
- Using Internet Explorer, navigate to the newly created SharePoint site e.g. <http://SERVERNAME>.
- Select Site Actions, Site Settings – a screen similar to the following will be displayed:

Site Collection Administration
[Recycle bin](#)
[Search Result Sources](#)
[Search Result Types](#)
[Search Query Rules](#)
[Search Schema](#)
[Search Settings](#)
[Search Configuration Import](#)
[Search Configuration Export](#)
[Site collection features](#)
[Site hierarchy](#)
[Search engine optimization settings](#)
[Site collection audit settings](#)
[Audit log reports](#)
[Portal site connection](#)
[Content Type Policy Templates](#)
[Site collection app permissions](#)
[Storage Metrics](#)
[Site Policies](#)
[Site collection object cache](#)
[Popularity and Search Reports](#)
[Content type publishing](#)
[Variations Settings](#)
[Variation labels](#)
[Variation logs](#)
[Suggested Content Browser Locations](#)
[HTML Field Security](#)
[Help settings](#)
[SharePoint Designer Settings](#)
[Site collection health checks](#)
[Site collection upgrade](#)

Figure 4: Site Settings, Site Collection Administration page

- Click on 'Site collection features' – a screen similar to the following will be displayed:

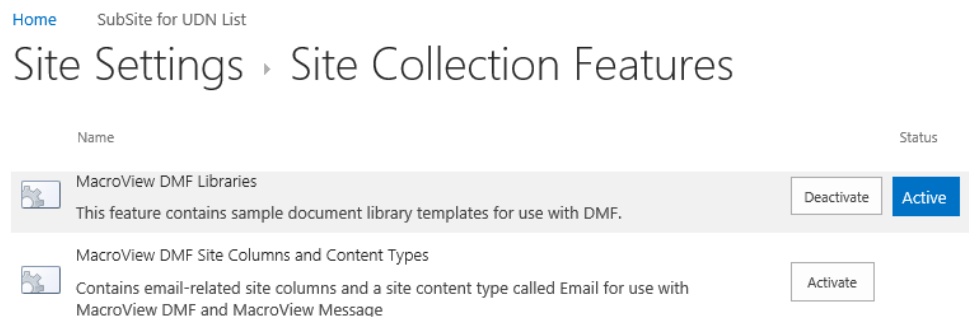


Figure 5: Site Collection Features page – 'MacroView DMF Libraries' highlighted.

- Activate the Feature 'MacroView DMF Libraries'.
- Activate the Feature 'MacroView DMF Site Columns and Content Types'

3.8.5 **Creating a new Document Library based on a supplied sample template**

- Navigate to a SharePoint site within a Site Collection where the 'MacroView DMF Libraries' feature has been activated.
- Select *Site Actions* and then *Create*.
- Select MacroView Library.
- You will be prompted for the name of the library, an optional description for the library as well as if you would like the library on the 'quick launch' menu.

MacroView DMF will automatically set the custom columns in the new library that relate to email attributes, so it is not necessary (or advisable) to select the 'email enabled' option as this will create columns for email-related metadata that are different to those expected by MacroView DMF.

3.8.6 **Steps for creating your own library template that will allow you to centrally manage your metadata**

We suggest you build up your production libraries from content types utilising the columns added by the [MacroView DMF Site Columns and Content Types](#) feature.

- Activate the site collection feature: [MacroView DMF Site Columns and Content Types](#)
- Create your own content type(s)
- Create a standard library
- Enable the use of content types in that library
- Add your content types

For reuse either:

- Save the library as a template,
- Use the template ONLY in the site collection that it was created in

Or

- Build up a list definition from the library.

3.9 Common problems with server installation

3.9.1 Insufficient rights

The most common problem is trying to install the software with insufficient permissions. You must be a Farm Administrator.

A network Domain Administrator is often NOT a Farm Administrator – many organisations security policies require that the Farm Administrator user is not a Domain Administrator.

3.9.2 Forgetting to activate (or reactivate) MacroView DMF Search

Another very common problem is forgetting to activate the [MacroView DMF Search](#) feature. This causes the Search Masks not to work.

3.9.3 Alternate Access Mappings

Incorrectly defined alternate access mappings will result in unexpected behaviour when using the client package.

3.9.4 Solution deployment

Errors related to *could not load assembly* are the result of the incorrect version of the solution package.

3.9.5 Sample library template not visible

The supplied MacroView samples templates are deployed via a site collection feature. You need to ensure that you activate the feature on all the site collections.

Note: For non-English versions of these templates contact MacroView.

3.9.6 Anonymous Authentication

The MacroView client has been architected to use the credentials of the currently logged in user account. Enabling anonymous authentication on the web application will prevent new users from building the DMF tree-view.

3.9.7 Load Balancer

You need to ensure that affinity with source IP is set on the load balancer. Cookie based affinity is not sufficient.

4. MacroView DMF Server – Upgrade

4.1 Summary (Checklist)

- Read the Important information about this release information in section 2.4 of this document.
- Retract & Delete/Remove the old version of the [MacroView DMF Solution](#).
- Add & Deploy the new version of the [MacroView DMF Solution](#).
- Update licensing
- Reactivate [MacroView DMF Search](#) feature on all web applications.

4.2 Instructions

4.2.1 Log onto the server as a Farm Administrator

Note that a Domain Administrator MAY NOT be a farm Administrator.

4.2.2 Retract MacroView DMF Solution

Due to new features that have been added to the [MacroView DMF WSP](#), you are required to fully retract and remove any previous version of the [MacroView DMF WSP](#) prior to adding and deploying this new version. Note that all [MacroView DMF](#) clients must also be updated to version 7 to work with the new Solution.

To retract with Central Administration:

- Launch the SharePoint Central Administration Console
- On SharePoint Server 2013, 2016 or 2019 select System Settings on the left and then select Manage Farm Solutions under the Farm Management heading.
- Within the *Solution Management* page select 'MacroView DMF.wsp' and retract the [MacroView DMF Solution](#).
- Select a convenient time to retract the solution.

To retract with the SharePoint Management Shell.

Running the command below on a SharePoint server located in a SharePoint Server Farm will deactivate the [MacroView DMF Solution](#) on all Web Front End servers in that Farm:

- `Uninstall-SPSolution -Identity "MacroView DMF.wsp"`

Note: *Uninstall-SPSolution* (PowerShell) is appropriate with SharePoint 2010 and above.

4.2.3 Delete or Remove MacroView DMF Solution

Running the following command on a SharePoint server located in a SharePoint Server Farm will remove the [MacroView DMF Solution](#) from all Web Front End servers in that Farm:

- `Remove-SPSolution -Identity "MacroView DMF.wsp"`

4.2.4 Solution Deployment Installation Steps

Follow the steps as outlined in section 3.4.2 above.

4.2.5 Update Licensing

See section 3.5.

4.2.6 Activate MacroView DMF Search

See section 3.6.

Note, a full crawl is not necessary in an upgrade.

4.2.7

If MacroView DMF Cache Manager was running restart it

See section 5.6.

Contact MacroView Professional Services (Solutions@macroview365.com) if you need assistance with your upgrade.

5. MacroView DMF Server – Advanced Configuration

5.1 MacroView Server with a Fully Qualified Domain Name (FQDN)

Organizations frequently refer to servers via a FQDN (e.g. 'moss.acme.com') as well as their NetBIOS name (e.g. 'moss07').

Generally, DNS entries can be used to assign alternative names for a server which can be used in a web browser. However, SharePoint also requires these alternative names to be defined in its 'Alternate Access Mappings' collection.

To add an Alternate Access Mapping use the following screen within Central Administration:

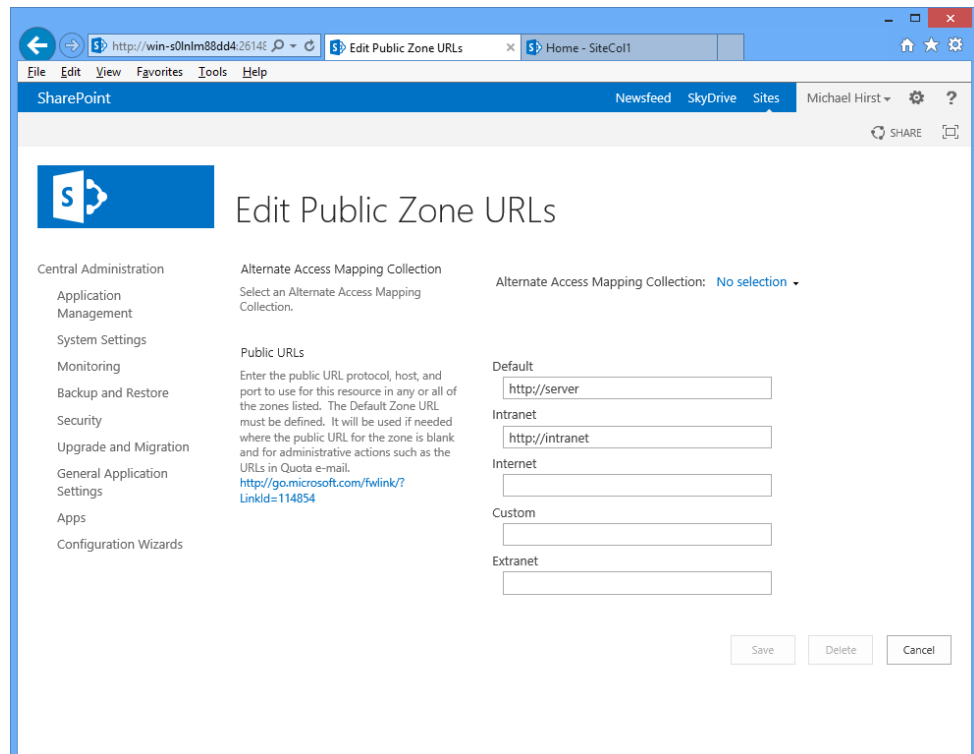


Figure 6: SharePoint Alternate Access Mappings page

If the FQDN is for a SSL-style server (e.g. <https://moss.acme.com>) you may need to configure a separate SharePoint Web Application with Basic Authentication. Each SharePoint Web Application should run only Integrated OR Basic authentication.

See Section 3.2 for more details.

5.2 My Sites (Personal Sites)

In an on-premises SharePoint environment, My Sites (personal sites) can be configured to exist in a number of different locations:

- As a Site Collection within the main SharePoint application
- As the root Site Collection⁴ in a separate SharePoint application
- As a non-root Site Collection in a separate SharePoint application

Note that in [MacroView DMF](#) the only My Sites that will appear are your own and the My Sites for those people you are following or have defined as Colleagues in **your** My Site. This is to prevent users in organizations with hundreds or thousands of staff from having all staff members My Sites appear in their Tree View by default.

⁴ e.g. <http://SERVERNAME:90> is a root site collection whereas <http://SERVERNAME:90/MySites> is NOT.

In first scenario, no special action is required for the My Sites to be visible via [MacroView DMF](#). In the other scenarios, [MacroView DMF](#) must be activated on the root Site Collection of the separate SharePoint web application that hosts your My Sites. Note that this is the case regardless of whether the My Sites are located at the root Site Collection. The separate SharePoint web application must also be added as a 'Server' in [MacroView](#) client installations.

5.3 What version of the MacroView DMF Server am I running?

The 'MacroView DMF Service Settings' page in SharePoint Central Administration shows the presently running server version.

- Open the SharePoint Central Administration console.
- Choose Application Management.
- Under [MacroView DMF Server](#), click [Configure MacroView DMF Service](#).
- Note the number after 'Version'.

5.4 Adjusting MacroView DMF Server Settings

The 'MacroView DMF Service Settings' page now controls the Enabling/Disabling of Web Service logging (and the location of the log files), the default Search URL, Cache Refresh Settings and a list of Document Libraries to hide from the users tree-view display.

- Open the SharePoint Central Administration console.
- Choose Application Management:

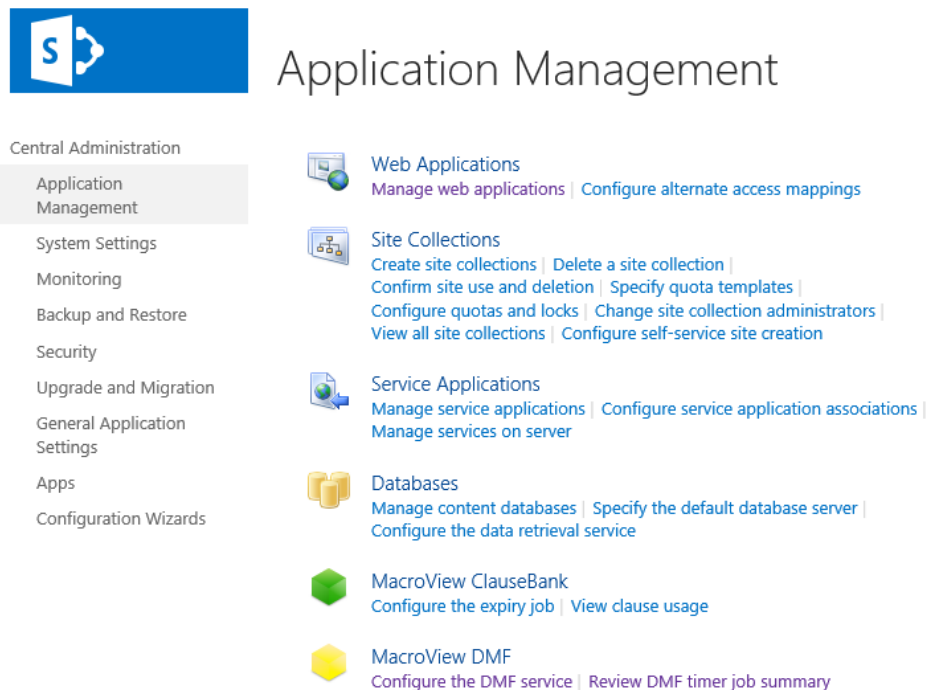


Figure 7: Application Management - [Configure MacroView DMF Services](#) highlighted

- Choose [MacroView DMF Server](#), [Configure MacroView DMF Server](#) – the [MacroView DMF Service Settings](#) page will be displayed:

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Apps

Configuration Wizards

Web Application: <http://tests2012sp2013/>

Logging

Enabling logging will activate server-side tracing for DMF Service activity. Detailed messages will be logged to the SharePoint Trace Log. This setting is not recommended for production environments other than for troubleshooting purposes.

Enable logging

Document Library Settings

Document libraries with titles listed here will not be shown in DMF tree views.

Document libraries to ignore:

- Form Templates
- Style Library
- Form Templates
- Style Library
- Form Templates
- Style Library

Retrieve Folder Level Column Defaults

Disable folder count checking

Distinguish limited access sites

Disable support for List Definitions used in creating a new library

Site Settings

Distinguish read or write access for sites where users only have Limited Access.

List Definition Settings

Disabling this setting will retrieve user defined List Templates only and exclude all List Definitions with Document Library as the base type

Hide no access site collections

Site Collection Settings

Site collections with Urls listed here will not be shown in DMF tree views. Hiding no access site collections will prevent site collections where users have no permission to the root web from being returned by the DMF service.

Hide no access site collections

Figure 8: MacroView DMF Services Settings page (1/2)

Search

Additional settings for search site tree queries.

Custom search site tree definition:

Url endings to exclude from search site tree:

Favorites

Specify the assembly to use for retrieval of user favorites from the DMF service.

Excluded Web Servers

Web Servers selected in this list will not serve content to the DMF Client. Servers that are disabled are not currently running the SharePoint Web Application service.

tests2012sp2013

Excluded servers message:

Enable user access to Audit Information

Version 7.8.3008.0

OK Cancel

Figure 9: MacroView DMF Services Settings page (2/2)

5.5 General Settings

See Figure 8: [MacroView DMF Services Settings](#) page above for the following.

5.5.1 **Logging: *Enable logging***

Enabling logging will activate server-side tracing for the [MacroView DMF](#) web service activity. Detailed messages will be logged to the SharePoint Trace Log. This setting is not recommended for production environments other than for troubleshooting purposes.

5.5.2 **Document Library Settings: *Document Libraries to ignore***

This textbox allows you to specify which document libraries (e.g. Pages) that are to be excluded from the [MacroView](#) tree-view display. Each Library should be specified on a separate line in the text box. A separate textbox must be completed for each Site Collection. Adding a new Library to this list does not require a refresh of the cache.

5.5.3 **Document Library Settings: *Retrieve Folder Level Column Defaults***

As it saves emails to SharePoint, [MacroView DMF](#) seeks to minimize user effort by automatically selecting the *Email* content type and by automatically recording email attributes in corresponding metadata columns (if such columns are available in the destination content type). [MacroView DMF](#) also captures metadata automatically as documents (non-emails) are saved / uploaded to SharePoint. This means that it is feasible to design a SharePoint document store so that the [MacroView](#) metadata capture dialog (also referred to as the [MacroView](#) profiling dialog) does not need to be displayed on many saves.

However if the destination document library has folders for which default values of metadata columns are defined, SharePoint will create an XML file that contains the default values for all folders in the library. If there are a large number of folders in the library, this XML file can become quite large. E.g. for a library with 40,000 folders, the XML folder-level defaults file can exceed 20MB. Transferring such large XML folder-level default files to and processing them in the [MacroView DMF](#) web service can significantly increase the time that [MacroView DMF](#) takes to prepare and display the profiling dialog.

If the design of the SharePoint document store is such that there are a large number of folder-level metadata column defaults, but the [MacroView](#) profiling dialog does not need to be displayed, the *Retrieve Folder Level Column Defaults* setting should be un-checked. This will prevent the unnecessary transfer and processing of a large XML file and so significantly speed up saves and uploads.

5.5.4 **Document Library Settings: *Disable folder count checking***

As the user clicks to expand a site node in a [MacroView](#) tree-view display of the structure of a SharePoint document store, [MacroView DMF](#) seeks to display any libraries contained in the site that contain content for which the user has permission. If the content is stored in folders or document sets, the libraries are displayed with an expansion indicator, which informs the user that expanding the library will reveal the folders / document set that contain their content.

If the document library contains folders or document sets the normal action of the [MacroView](#) web service is to count the folders / document sets for which the user has permission. The system resources required for this checking increase significantly if the folders / document sets have unique permissions (i.e. there is a break in permission inheritance before each folder / document set). This can cause unacceptably long response times as the user expands a site node.

If the library contains a large number of folders / document sets that have unique permissions, most of the response time is associated with determining the users permissions to those folders / document sets so that the system can know whether or not an expansion indicator should be displayed for each of the document libraries in the site.

Checking the *Disable folder count checking* setting stops MacroView from checking whether the user has permission to folders / document sets, which can significantly reduce the response time associated with expanding a site. Note that the libraries in the site will then be displayed with an expansion indicator which may not be accurate – i.e. when the user clicks to expand a document library the user may find that in fact there are no folders / document sets to be displayed.

5.5.5 **Site Settings: *Distinguish Limited Access Sites***

Distinguish read or write access for sites where users only have Limited Access.

The *Distinguish Limited Access Sites* feature in DMF is about avoiding a situation where a user sees a Site Collection in their DMF tree, then clicks to expand that Site Collection but ultimately finds that they do not have permission to any nodes in that Site Collection. This situation can arise in a Site Collection wherein a user has access to some sub-site(s) nested below the root site, but no permission to the root site. In such cases SharePoint may show that user as having limited access to the root site. This Limited access will remain set even if subsequently the user's Permissions are changed so that they no longer have any access to any sites within the Site Collection.

If the user has Limited access to the root site of a Site Collection and the *Distinguish Limited Access Sites* setting is ON, DMF will do a full traverse of that Site Collection, checking every node to see if it can find one for which the user has permission. If no such nodes are found, DMF will not display the Site Collection even though the user is shown as having limited access to it.

5.5.6 **List Definition Settings: *Disable support for List Definitions used in creating a new library***

Disabling this setting will retrieve user defined List Templates only and exclude all List Definitions with Document Library as the base type.

5.5.7 **Site Collection Settings: *Site collections to ignore***

Site Collections (i.e. SPSites) with URLs listed in this text box will not be shown in DMF tree view display. Each Site Collection should be specified on a separate line in the text box. A separate textbox must be completed for each Web Application.

Note that if Server Side Caching is active, adding a new Site Collection to this list does not require a refresh of the cache.

5.5.8 **Site Collection Settings: *Hide no access site collections***

Hiding no access site collections will prevent site collections where users have no permission to the root web from being returned by the DMF service. If this setting is ON, Site Collections where the user has no permission to the root site will not be displayed in the user's DMF tree – DMF will not traverse the Site Collection to check whether that user has permission to a sub-site.

This setting can be useful as a means of speeding up the display of the DMF tree, but only if users who have permission to a sub-site within the Site Collection also have permission to the root site of that Site Collection.

Note that when a user is granted permission to a sub-site, SharePoint will automatically also grant that user Limited access to upper level sites (including the root site). However that Limited permission will not extend to sites that are positioned above a point where Permission Inheritance is again broken. The consequence of this is a user may not have Limited permission to the root site even though that user has permission to a sub-site within the Site Collection. If the *Hide No Access Site Collections* setting is ON the Site Collection will not be displayed.

5.5.9

Search: Additional settings for search site tree queries

The *Search Site Tree* command is able to find and navigate to sites (webs), document libraries, folders and document sets in SharePoint 2013, 2016, 2019 and SharePoint Online servers.

When used with a SharePoint 2013, 2016 or 2019 server, Search Site Tree can be configured so that nodes with URLs that have specified endings are excluded from Search Site Tree results - e.g. Forms Libraries can be excluded by specifying */Forms*.

Search Site Tree can also be customised by entering a custom XML definition in the *Custom search site tree definition* field. This setting is only required if you need to:

- include custom list definitions (i.e. libraries that have a custom content class) in *Search Site Tree* results.
- make any search scopes (Site, Libraries, Folders or Document Sets) unchecked by default.
- change the name of the *Search Site Tree* function.

Search Site Tree cannot be customised on SharePoint Online (Office 365) or Client Side Only servers

Search

Additional settings for search site tree queries.

Custom search site tree definition:

```
<searchsitetreetypes title="Search Site Tree" label="Query" menutext="Search Site Tree">
<type text="Sites" query="contentclass:STS_Site OR contentclass:STS_Web" selected="true"/>
<type text="Libraries" query="((contentclass:STS_List_DocumentLibrary) OR
(contentclass:STS_List_10000))" selected="true"/>
<type text="Folders" query="(ContentTypeID:0x0120* AND (NOT ContentTypeID:0x0120D520*))"
selected="true"/>
```

Url endings to exclude from search site tree:

```
/Forms
/FormServerTemplates
```

Figure 10: Additional settings for Search Site Tree queries area of configuration page for MacroView DMF

```
<searchsitetreetypes title="Search Site Tree" label="Query" menutext="Search Site Tree">
<type text="Sites" query="contentclass:STS_Site OR contentclass:STS_Web" selected="true"/>
<type text="Libraries" query="((contentclass:STS_List_DocumentLibrary) OR
(contentclass:STS_List_10000))" selected="true"/>
<type text="Folders" query="(ContentTypeID:0x0120* AND (NOT ContentTypeID:0x0120D520*))"
selected="true"/>
<type text="Document Sets" query="ContentTypeID:0x0120D520*" selected="true"/>
</searchsitetreetypes>
```

Figure 11: Sample *Custom search site tree definition* with additional custom content class included

MacroView Professional Services (solutions@macroview365.com) can provide further assistance with configuring a Search Site Tree custom definition.

5.5.10

Search Site tree: Query row limit

In earlier versions of MacroView DMF Search Site Tree returned a maximum of 100 results - the default limit imposed by the SharePoint Search engine. In some situations this caused document libraries to not be displayed, even though they satisfied the search criterion entered by the user. This was particularly the case when a large number of views were defined for document libraries.

MacroView DMF 8.3 and later returns results automatically trimmed so that each document library appears only once, regardless of the number of views

that are defined for that library. The results are also paged so that there is no limit on the number of results that can be displayed. The Query row limit in early versions is no longer applicable.

5.5.11 **Favorites: Favorites Assembly**

Specify the assembly to use for retrieval of user favorites from the DMF service.

This is a reference to a custom assembly that provides for organizations to serve favorites to users e.g. as part of an automated matter/project creation process that adds favorites for users assigned to the matter automatically. See section 7.8.4 for more information.

5.5.12 **Excluded Web Servers**

Excluded servers

Web Servers selected in this list will not serve content to the DMF Client. Servers that are disabled are not currently running the SharePoint Web Application service.

Excluded servers message

This is the message that will be displayed to a user attempting to access a server that has been tagged as an Excluded Server.

5.5.13 **User access to Audit Information: Enable user access to Audit Information**

Allows a user access to Audit Information recorded by SharePoint through the DMF client for any item which they have permission to view. **WARNING:** By default only an Administrator for a Site has access to this Audit Information from the Web UI.

5.6 **Cache Refresh Settings**

MacroView DMF uses sophisticated caching at the server to ensure responsive performance for users in large SharePoint environments. Configuring the caching starts with the question of whether your SharePoint implementation will benefit from it (not all implementations do) and goes from there. If you really want to 'go it alone' then read the following very carefully, and then, and only then, read through the Knowledge Base Article entitled '[Activating or deactivating DMF Server Cache features](#)' or contact MacroView Professional Services (solutions@macroview365.com) for assistance.

MacroView DMF supports both Full and Incremental Updates of the server-side cache. When server side caching is enabled, settings for full and incremental crawl can be configured here.

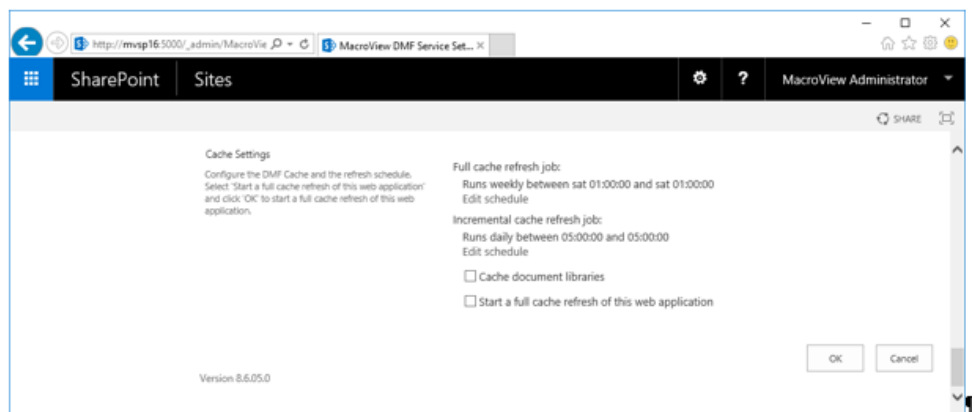


Figure 12: Cache settings in SharePoint when server side caching is enabled

5.6.1 Full Cache Update Job

Activating the [MacroView DMF Cache Manager Feature](#) for a Web Application creates a Full Cache Update job. Clicking *Edit* allows you to change the Schedule and Performance of this job.

Schedule

This job has a default schedule once per week. An instance of the job is scheduled to run one minute from the time of activation in order to ensure that the cache is populated up front.

Performance

The Full Cache Update performance can be set to

- Normal (default)
- Partly Reduced
- Reduced

Full Cache Refresh job updates all webs recursively and will not start if a previous Full Cache Refresh job is still running.

5.6.2 Incremental Cache Refresh Job

Activating the [MacroView DMF Cache Manager Feature](#) for a Web Application creates an Incremental Cache Update job. Clicking *Edit* allows you to change the Schedule and Performance of this job.

Schedule

An Incremental Update Job is created in the Web Application and configured to run daily. No instance of the Incremental Job is created when activating [MacroView DMF Cache Manager Feature](#).

Organizations that frequently create libraries or change permissions should run the Incremental Cache Refresh more often. A new Incremental Cache Refresh job will not start if a previous such job has not yet completed.

The Incremental Cache Refresh Job accesses the SharePoint Change Log to retrieve entries that it has not previously processed. A separate retrieval is made for each Site Collection.

The Incremental Cache Refresh Job uses the SharePoint Change Log to gather events that caused changes to list and webs to update the cache with new document library counts, potential permissions inheritance changes and any new webs that were added but did not get caught by the global web added feature. Event receivers are not updated by this process.

Performance

Incremental Cache Update performance can be set to:

- Normal (default)
- Partly Reduced
- Reduced

Administrators viewing the Windows Performance monitor may notice periods of sustained high CPU activity related to the DMF Incremental Cache Refresh. Scheduling the Incremental Cache Refresh to run at 1 minute intervals can give the impression of a single Job that is running for long periods – many separate Incremental Cache Refresh jobs running ‘back-to-back’ will result in similar performance characteristics.

CPU usage can also be reduced by increasing the interval for the Incremental Cache Refresh. Organizations with relatively static SharePoint repositories (i.e. low / no change to structure) may want to set the Incremental Cache Refresh interval to 59 minutes or even disable this job and rely on the Full Cache Refresh.

Setting the Incremental Cache Refresh frequency to zero will disable (actually remove) the Incremental Job. No Jobs are pre-scheduled so the first time they run will be at the frequency set on the page.

5.6.3 **Cache document libraries**

Checking this box includes document libraries in the cache. As with the above discussion, deciding whether or not include libraries in the cache is about weighing the overhead of the additional time refreshing the cache versus how long it would take to simply get the list of libraries directly when a user opens a node in the tree.

5.7 **Federating Multiple SharePoint Server Farms**

The architecture of [MacroView DMF](#) makes it relatively easy to 'federate' multiple server farms, e.g. so that a user in Sydney office can view a 'merged' site tree which contains some sites and libraries that are physically stored on server farms in London and San Francisco offices.

With [MacroView DMF](#) this is handled by inserting Virtual Webs into the Server-side Cache. These nodes are identical to the standard web nodes in the Cache, but contain additional attributes to 'redirect' Clients to the physical location of the Virtual Web. Contact support@macroview365.com for more information about using Virtual Webs to federate multiple server farms.

5.8 **Configuring DMF Search Panels**

DMF Search Panels are compatible with SharePoint 2013, 2016, 2019 and SharePoint Online Search. The standard server component installation for DMF will automatically create Search Properties that correspond to the metadata attributes that appear in the Search Panels that ship with DMF.

Note that these Search Properties are automatically created in SharePoint 2013, 2016 and 2019.

Note also that search panels will not return results until after a full crawl has been done to register the newly created properties with the search index.

5.8.1 **XML Definition File**

The appearance and operation of DMF Search Panels is controlled by an XML definition file that is stored at the SharePoint Server (Web Application). By editing this XML definition file suitably authorized users can create additional Search Panels with whatever controls are relevant given the metadata usage within the organization. For example a new Search Panel for use by Finance Department users that contains a control for searching by Invoice ID, or a new Search Panel for a legal firm that contains a control for Office or Area of Law.

The XML definition file also defines the Scope/Result Source in SharePoint 2013, 2016 or 2016 and Documents Only components of the query that the Search Panel passes to the SharePoint Search Engine, and the columns that are present in the display of search results for the Search Panel.

Contact MacroView Professional Services (Solutions@macroview365.com) if you need assistance with configuring Search Panels.

5.8.2 **Scope / Result Sources**

In SharePoint 2016 and 2019, search uses Result Sources to target specific subsets of the items in SharePoint. [MacroView DMF](#) continues to use the attribute "Scope" in the XML definition for search panels in SharePoint 2016 and 2019, however the name of the Result Source should be used instead.

The shipped DMF Search Panels use a Result Source called 'mvAllSites', which is effectively the same as 'AllSites'⁵. This means that the DMF Search Panels will search across all documents stored in a Server (Web Application). To use a different Result Source you need to reconfigure the DMF Search Panel or create a new DMF Search Panel.

5.8.3 Documents Only

MacroView DMF is designed as a document management tool. Default DMF Search Panels will only find files that are recognized as Documents by the SharePoint Search engine. The search results displayed by the SharePoint Search web browser UI contain Pages, List entries, etc in addition to documents. In some cases a DMF Search Panel may not find a file that is listed in the search results when using the SharePoint Search web browser UI. This indicates that additional file types need to be registered in SharePoint as Documents for the purposes of SharePoint Search.

5.8.4 SharePoint Online of Client Side Only Search Panels

The appearance and operation of DMF Search Panels for SharePoint Online (Office 365) and when using Client Side Only mode is controlled by an XML definition file. This file is stored by default on the local computer under the MacroView DMF Store folder (*%appdata%\Roaming\MacroView DMF\Store*).

To share a client side only search mask, store it in a library in your SharePoint environment and configure each client installation to obtain it's search mask definition file from this location under *DMF Options > Support*.

By editing the *O365Masks.xml* file in the above folder users can create additional Search Panels for SharePoint Online (Office 365) and Client Side Only servers in MacroView DMF.

Note: If the *O365Masks.xml* file is invalid or not present MacroView DMF will provide the default set of search masks.

Contact MacroView Professional Services (Solutions@macroview365.com) if you need assistance with configuring Search Panels.

5.9 Audit History

MacroView DMF provides an *Audit* option on menu that displays when you right-click on a file in a DMF file list. That option will generate a grid display of usage activity on the file. The *Audit* option to be greyed out (unavailable) unless SharePoint Audit logging is turned on for the Site Collection and the MacroView DMF setting *Enable user access to Audit information* is ON.

MacroView DMF can be customized to log additional types of activity in the SharePoint Audit log, so that that activity is displayed by the *right-click, Audit* option. Contact MacroView Professional Services (solutions@macroview365.com) for details.

5.9.1 Configure Audit logging at the Site Collection level

- Navigate to the Site Collection
- Ensure that you are logged in as a Site Collection Administrator
- In the Site Collection Administration menu choose *Site collection audit settings*
- Click to select the events that you wish to have audited (i.e. recorded in SharePoint Log).

⁵ The mvAllSites scope exists to avoid issues in non-English-language installations of SharePoint, where a Scope called 'AllSites' generally does not exist.

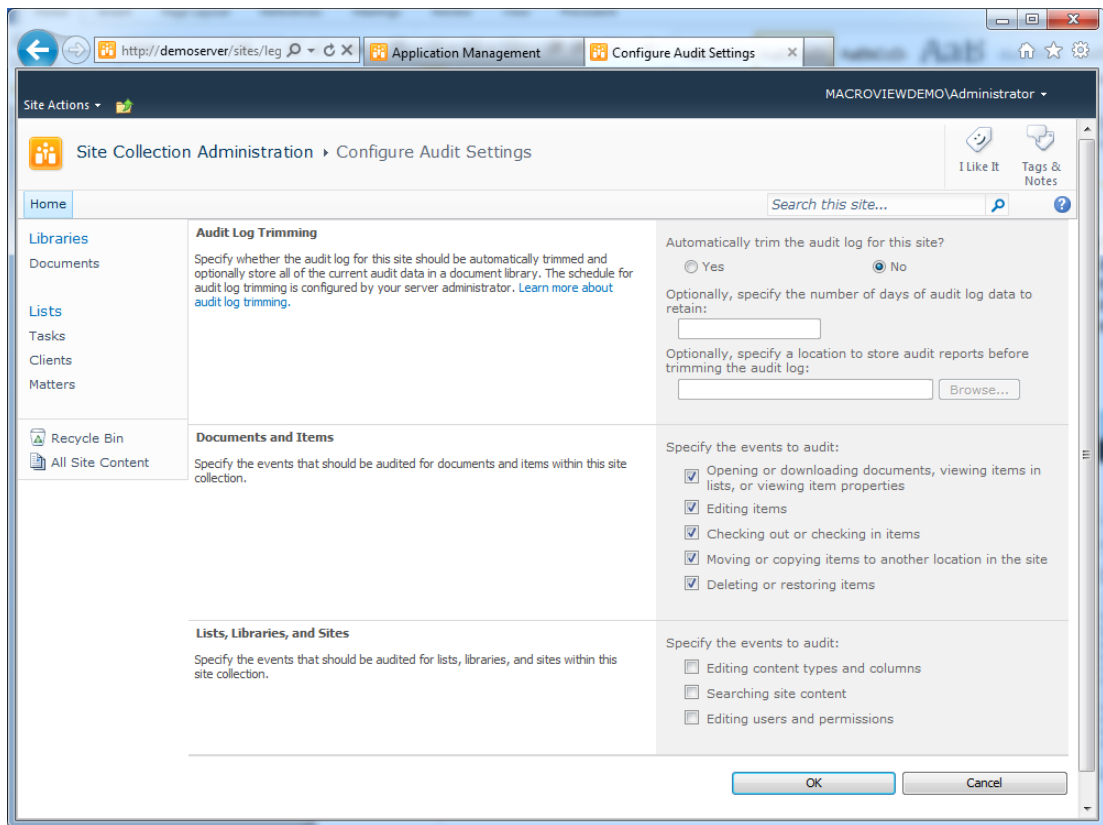


Figure 13: Site collection audit settings page
- note events specified for auditing in Documents and Items section

5.9.2 Enable user access to Audit information

- In SharePoint Central Administration, select *Applications Management*.
- MacroView DMF, Configure the DMF service.
- Ensure correct Web Application is selected.
- Click to select Enable user access to Audit information

User access to Audit Information

Allows a user access to Audit Information recorded by SharePoint through the DMF Client for any item which they have permission to view. **WARNING:** By default only an Administrator for a Site has access to this Audit Information from the Web UI.

Enable user access to Audit Information

Figure 14: MacroView DMF Service Settings page, Enable user access to Audit information checked.

5.10 Moving or Copying Sites (Webs)

Deploying server-side caching adds custom .NET logic to each SharePoint Web⁶. This logic must be removed before the Web is copied or moved to another location using STSADM.

De-activating / disabling the MacroView DMF Cache Manager feature will automatically remove the custom .NET caching logic from all Webs in all Site Collections in that SharePoint web application.

⁶ Internally in SharePoint a Web is used to implement what the end-user sees as a 'site'. A 'Site' is used to implement what the end-user sees as a 'Site Collection'.

6. **Activating MacroView DMF for use with Office 365 or Client Side Only mode**

MacroView DMF 365 and MacroView DMF in Client Side Only mode allow you to use DMF or Message with on-premises and SharePoint Online servers without the server components installed.

In order to use MacroView DMF or MacroView Message with an on-premises server using Client Side Only mode or with an Office 365 / SharePoint Online tenant, organisations first need to associate their MacroView license with the on-premises server farm or Office 365 tenant via the MacroView Licensing Website.

Refer to [Managing MacroView 365 and Client Side Only Licenses](#) for details on how to activate license for use in either of these modes.

7. MacroView DMF Client – Installation

7.1 Summary

These instructions apply to the installation of the [MacroView DMF](#) client.

[MacroView DMF](#) is fully Microsoft .NET compliant and relies on Microsoft .NET Framework v4.8 and .NET Programmability for Microsoft Office (which in turn requires VSTO support). Before installing the [MacroView DMF](#) Client you should ensure that these are available on the workstation

Note: Ensure there are no applications running on the client workstation before commencing the installation.

7.1.1 Installation Steps - Summary

- Login as Administrator⁷
- Ensure that Microsoft .NET Framework version 4 is installed
- Ensure that .NET Programmability for Microsoft Office is available
- Ensure the correct version of VSTO is installed
- Run the [MacroView DMF Setup EXE](#)
- Test the client installation

7.1.2 Automated Installation

An MSI install file can be extracted from the DMF EXE file using WinZip or WinRAR. The MSI installation can be automated using standard techniques – see Section 7.8 for more details.

7.2 Ensure that the correct version of the .NET Framework is installed

You are required to install the .NET Framework 4.8 on a workstation before installing the [MacroView DMF](#) client.

See these Microsoft sites for details on how to download and install:

<https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48>

7.3 Ensure that .NET Programmability for Microsoft Office is available

[MacroView DMF](#) significantly extends the integration between Microsoft Office and Microsoft SharePoint. This includes addition of customisations into Office. For this reason, [MacroView](#) relies on .NET Programmability for Microsoft Office being installed and available on the client workstation.

Note that .NET Programmability must be installed for each Office product – Word, Excel, PowerPoint and Outlook.

⁷ Unless the System Administrator has published [MacroView DMF Setup](#) by using Group Policy.

7.3.1 Microsoft Office 2016 and 2019

The following screen shots shows how to determine whether .NET Programmability support is available for Microsoft Office 2013, 2016 and 2019. Clicking on the highlighted node will cause support to be added.

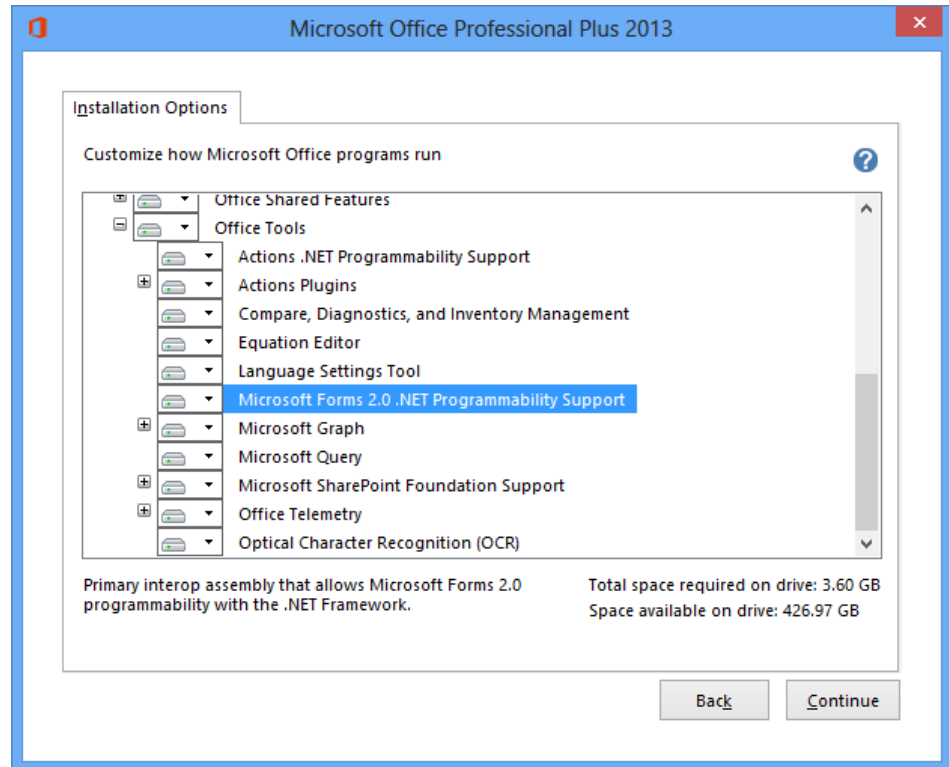


Figure 15: Microsoft Office 2013 - .NET Programmability Support

7.4 Ensure that Visual Studio Tools for Office (VSTO) is installed

MacroView DMF requires that VSTO 4.0 Runtime for Office is installed. It can be downloaded from the [MacroView DMF installation site](#).

7.5 Run the MacroView DMF Setup EXE

There are separate installation downloads depending on your version of Windows⁸. These include:

Make sure that you've downloaded the correct client installation file for your environment.

- [MacroView DMF 64-bit for 64-bit Windows](#)
- [MacroView DMF 32-bit for 32-bit Windows](#)

Ensure that you've downloaded the correct version for your environment.

- Download the relevant Client installation zip file from the [MacroView DMF website](#)
- Save and unzip it to a shared location and click to run EXE install – the screen shown below in Figure 16 will appear. Note: You should extract the install EXE to a local location (e.g. C:\temp) prior to executing it rather than executing it directly from the zip file.

⁸ The installer for DMF 8.4.88 and later is aligned with the version of Windows in use where previously it was aligned with the version of Office. This means a single 64-bit installer is now used for both 32-bit and 64-bit Office on a 64bit Windows computer and a separate 32-bit installer is used for 32-bit Office on a 32bit Windows computer.

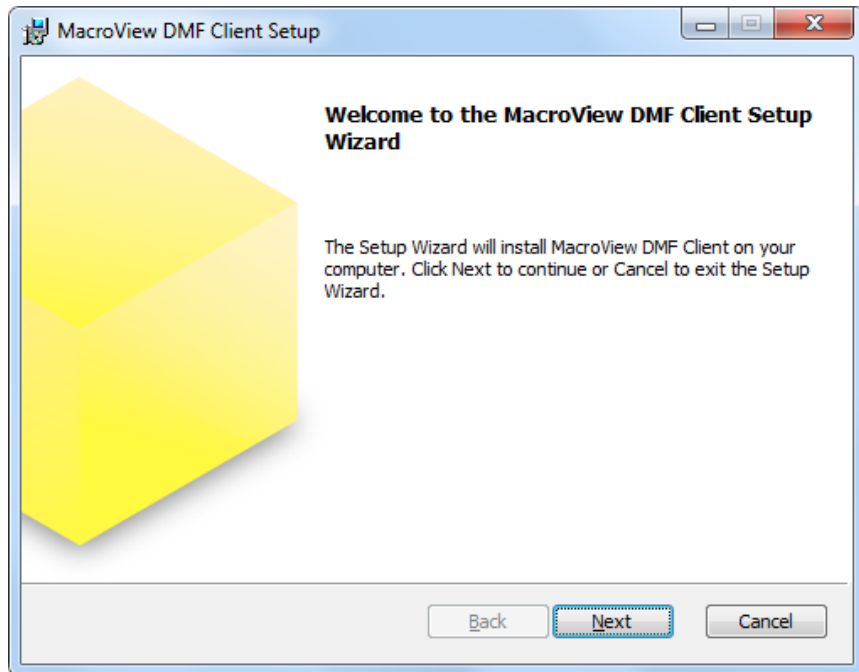


Figure 16: First dialog displayed by MacroView DMF client install EXE

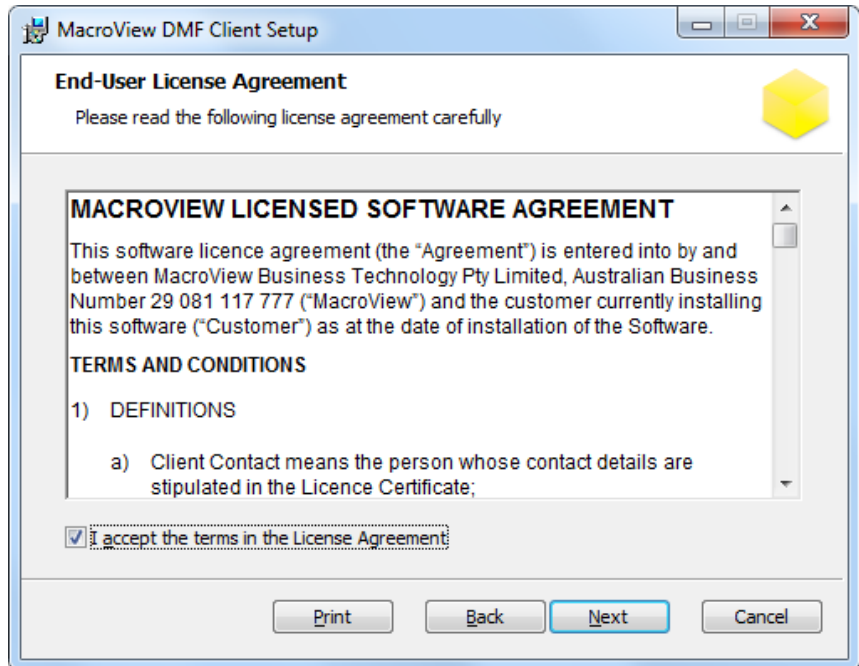


Figure 17: MacroView DMF Client install - Terms and Conditions dialog

The MacroView DMF Client installation will add shortcuts to the user's Windows environment to facilitate invoking MacroView DMF Explorer and the MacroView Setup utility. Being able to invoke the Setup utility from Windows can be useful in situations where the user needs to adjust the registered SharePoint servers available to MacroView DMF without bringing up the MacroView DMF tree-view display (to use the Tools, Options menu item).

The MacroView DMF Client installation will next proceed automatically and display a message when complete.

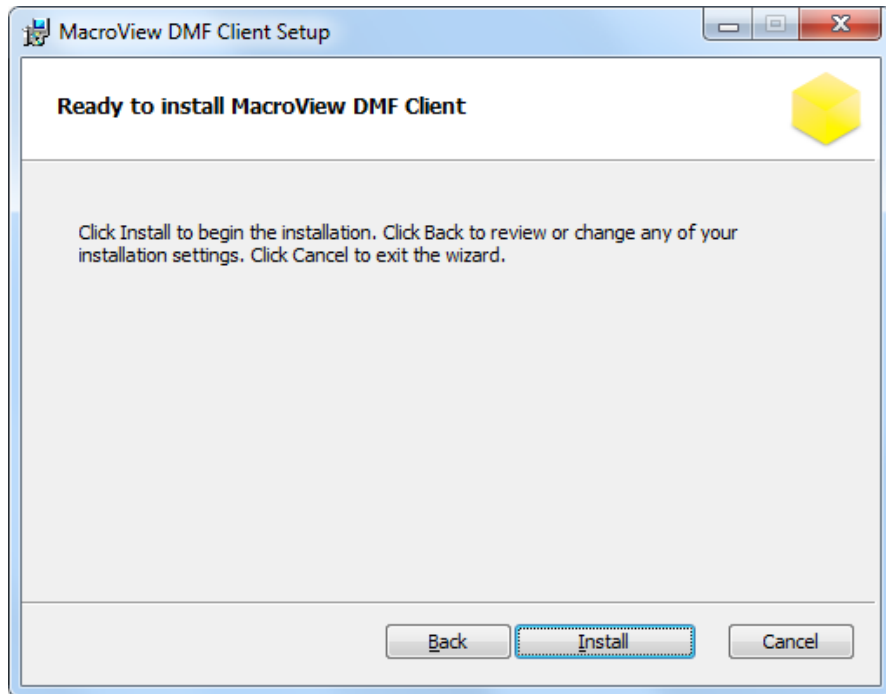


Figure 18: MacroView DMF client install - 'Next to start' dialog

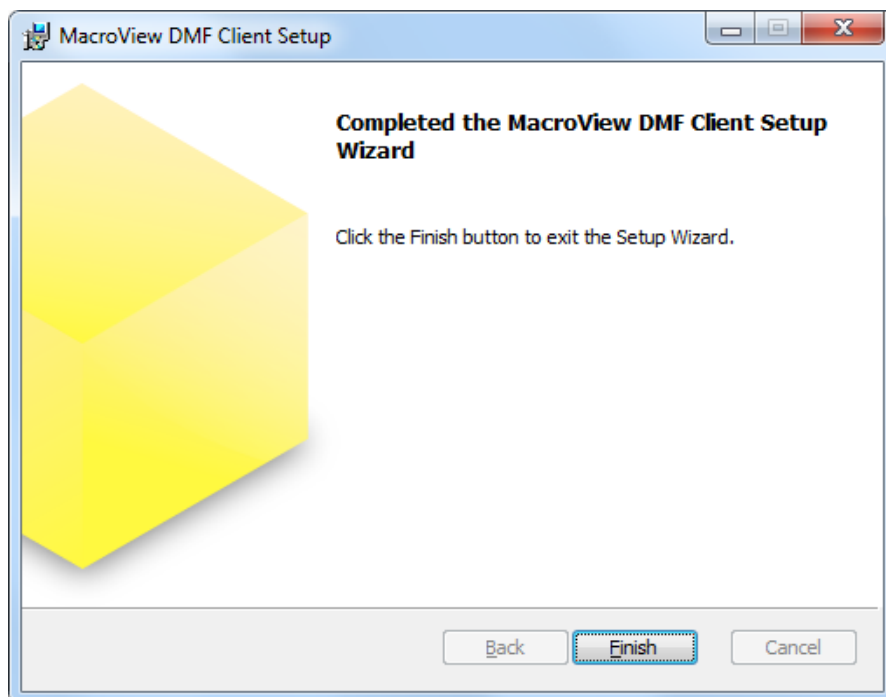


Figure 19: MacroView DMF client install successful

7.5.1

MacroView DMF Local Service

When you run *MacroView DMF* a local service is also run in the background. An icon for it appears in the notification area on the taskbar. It shows up in Task Manager as *MacroView DMF Cache Manager*. Its main function is to handle all interaction between the *MacroView DMF* software and the various SharePoint servers. You can right click on its icon and *Open DMF Explorer*, *Open DMF Options*, *Clear the cache* (which refreshes the in-memory cache from the saved cache), and close it (*Exit*).

7.6 Test the Client Installation and configure your first server

After installing MacroView DMF, start Microsoft Outlook. The MacroView DMF add-in will load. If this is your first use of MacroView DMF, you will be prompted with the following dialog asking for the details for a SharePoint server:

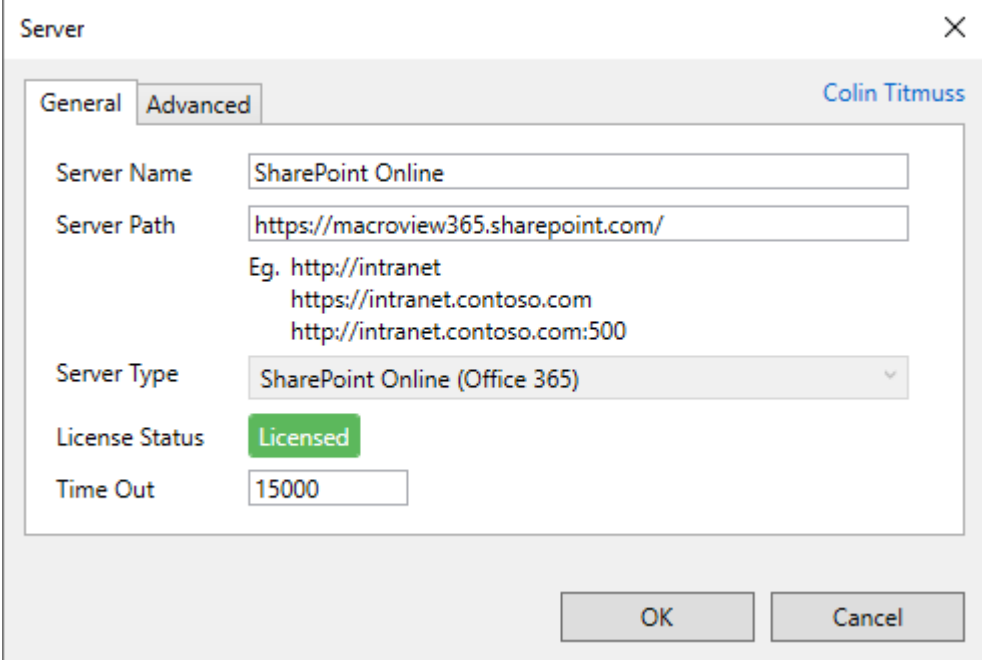


Figure 20: *Options, Servers, Edit details* dialog 'Server Name' is the label that will appear in the DMF tree-view. You can set this to whatever value you want e.g. 'Document Store'.

The value entered for the 'Server Path' setting must be a valid URL for a SharePoint web application. Do not include the path to a site or library (i.e. <http://server> will work, <http://server/site/library> will not work). Consult your administrator for the correct Server Path.

It is also necessary for the 'Server Type' setting to accurately reflect the type of SharePoint server you are setting up. *You cannot change the server type after the server entry has been created.* If the wrong server type is selected you must delete the original server entry and create a new one. If you are unsure whether you are running SharePoint Server 2016/2019, Office 365⁹ or Client Side Only, contact a server administrator who can advise.

- In the main screen of Outlook, you should see a Ribbon group named *MacroView* (Outlook 2016 or 2019).
- In this customization, click *Open...* – the MacroView tree-view should display and list the server that was registered during installation.
- Click to expand the server – this should show all sites in the server.
- Click to expand a site – this will show all the document libraries in that server, with the files stored in the first library listed in the File List pane on the right.
- Right click on a document library and select *Add to Favorites*. MacroView will display a proposed name for the new SharePoint Favorite. Click *OK* to accept.
- Close the *SharePoint Open* window.
- In the Outlook folder list there should be a new folder called '<SharePoint>', with the newly created favorite appearing as a sub-folder.

⁹ Access to Office 365 or *Client Side Only* servers require that your *MacroView DMF*, *MacroView Message*, *MacroView DMF 365* or *MacroView Message 365* license is activated via the MacroView Licensing Website.

7.7 Registering Additional SharePoint Servers to be accessed from the client

MacroView DMF includes an executable called 'MacroView DMF Setup'. If you run this executable you will be able to register new servers and edit details for existing servers without needing to launch MacroView DMF Explorer.

7.8 Automating the Client Installation

Organizations can use a variety of approaches to automate the deployment of MacroView DMF / MacroView Message to user workstations.

7.8.1 Active Directory Software Installation with Group Policy

For organizations that do not have a formal deployment utility, MacroView recommends using the Software Installation feature of Active Directory (AD) Group Policy.

An MSI install file can be extracted from the DMF EXE file if you open the EXE in an archive utility (e.g. 7-Zip, WinZip, WinRAR).

By defining a new Software Installation Package that uses the MacroView DMF Client MSI, an organization can perform a bulk deployment of MacroView DMF. The scope of the installation Package can be defined to be either groups of users or nominated computers based on their presence in an Active Directory Organizational Unit.

Note that if you have an existing version of MacroView DMF installed and used a deployment method other than Group Policy, the existing version will not be upgraded or replaced.

7.8.2 Group Policy Configuration

Regardless of the method used to deploy the DMF client software, MacroView DMF settings can be applied across an organization by using a Group Policy Administrative Template (ADMX file).

A **sample** ADMX file is available for download from the MacroView DMF Download and Installation page, with the name 'MacroViewDMF.admx'. Using an ADMX file provides a convenient method for specifying default SharePoint servers in the MacroView tree-view. MacroView recommends that administrators review the ADM settings in the file and configure for their organization.

Note that any settings enabled in the ADM will override and lock the corresponding setup option in the MacroView DMF client.

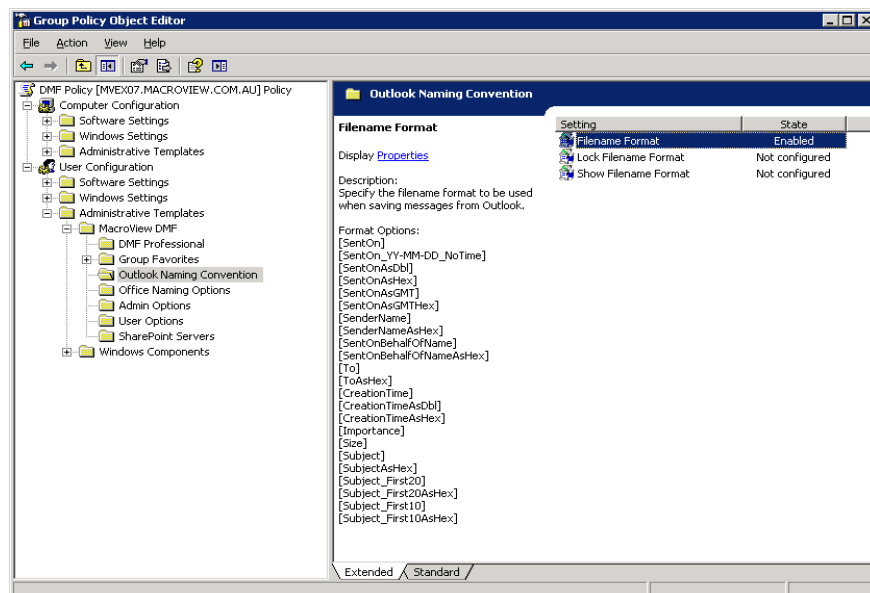


Figure 21 Group Policy Configuration of MacroView DMF

7.8.3 SharePoint Favorites

The SharePoint Favorites managed by MacroView DMF are stored locally on each workstation at the following location:

C:\Users\[USER]\AppData\Roaming\MacroView DMF\Store\Favorites.xml

7.8.4 'Push' Favorites

Favorites mode in MacroView DMF and Message allows users to quickly navigate to certain areas of the SharePoint document store. Favorites are particularly useful in organisations where *Browse* mode displays a large number of nodes in the SharePoint document store.

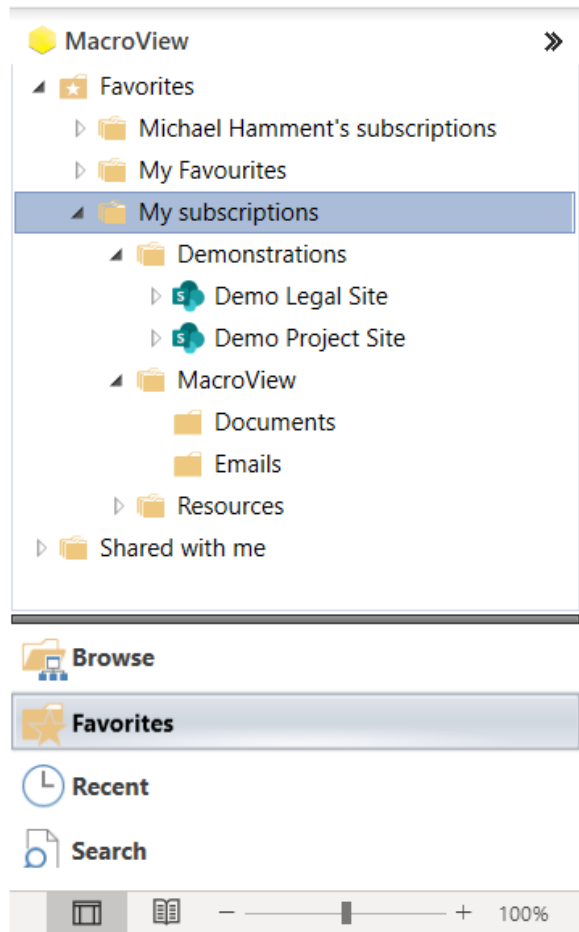
MacroView Push Favorites is an optional module for MacroView DMF and Message that automates the creation of favorites for users. MacroView Push Favorites is managed by using a subscription list in your SharePoint environment.

MacroView Push Favorites can be used with MacroView DMF or Message 8.7.141 or later against any SharePoint Online (Office 365) tenant or on-premises SharePoint 2013, 2016 or 2019 running in Client Side Only mode.

When *Favorites Subscriptions* are enabled on a server entry in DMF Options, MacroView DMF will retrieve details of subscriptions for the current user from a subscription list in the root site collection of the tenant or server and create a favorite node under *My subscriptions* in the Favorites mode of DMF or Message.

Then whenever the favorites in DMF or Message are refreshed they will be updated to reflect any additions, edits or deletions in the subscription list.

DMF
v8.7



Favorite locations in the subscription list can be a site, library, folder or document set and can be organized into favorite groups.

You can also add an entry in the subscription list for a user to follow another user's subscriptions in which case an additional top level node is created in

Favorites mode with the title *Username's* subscriptions. The other users' subscriptions are listed under this node. This can be particularly useful when teams want to share favorites or a user (e.g. an executive assistant) needs to see their colleague's favorites.

Configuration

Configuring *MacroView Push Favorites* is easy. The first step is to obtain a *MacroView Push Favorites* license from MacroView Services.

Then follow these steps:

- Enable *Favorites Subscriptions* on the DMF server entry
- Ensure the client side Push Favorites extension is enabled
- Create a Subscription list
- Add subscription entries to the list

Once you have a licence refer to [this article](#) on the Help Centre for configuration information.

Contact [MacroView Services](#) for information on these other Push Favorites solutions:

- 1 [MacroView Push Favorites \(for SharePoint Server\)](#)
- 2 Custom Push Favorites solutions (e.g. to call a custom web service)

7.9 Common problems with client side setup

7.9.1 Prerequisites missing

- Visual studio tools for Office (VSTO) or .Net Programmability for Office as it is also known is often not installed. The MacroView Office add-ins will not be visible if this component is not available.
- Installing .Net Framework v4.5 is *not* a substitute for .Net Framework v.4. You will still need to install .Net Framework v.4 full version.

7.9.2 Correct version

MacroView supply two versions of the client package. Client installation is now aligned with the version of Windows installed. This means the 64 bit installer should be used on 64 bit Windows regardless of the version of Office in used and the 32bit installer should be used on 32 bit Windows

7.9.3 No Search results

MacroView utilises and extends the native SharePoint Search functionality. When troubleshooting search matters ensure that the browser returns results and that you have completed a full crawl prior to contacting MacroView.

7.9.4 Adobe 'runtime' error

When using Adobe Reader X or XI you will need to Disable Protect Mode option in Adobe.

In Adobe Reader X this can be done by going to Edit > Preferences > General and deselecting Enable Protected Mode at start up.

In Adobe Reader XI this can be done by going to Edit > Preferences > Security (Enhanced) and deselecting Enable Protected Mode at start up.

In Adobe DC MacroView DMF 9.1 and later supports enabled Protected mode.

[See more..](#)

8. MacroView DMF Client – Upgrade

8.1.1 General process

The basic process is quite simple:

- Uninstall **MacroView DMF** and all other MacroView Software (if you are upgrading from another “series”)
- Install any additional workstation prerequisites for the **MacroView DMF** version to be installed
- Install new versions of **MacroView DMF** followed by the matching versions of the other MacroView software

In general, user settings including favorites and recent files will carry forward into the new version. Exceptions to this are:

- Cross grading from **MacroView Message** to **MacroView DMF** is not supported. **MacroView Message** must be uninstalled and user settings in **MacroView Message** will not be transferred.
- If you are upgrading from DMF Client v7.9.5054 through v7.10.34 the DMF local service must be shut down before installing the new client to ensure unsaved *Recents* and *Favorites* are retained.

If you are upgrading from a version of **MacroView DMF** prior to 6.7, and it is vitally important to keep all users settings, favorites and so on, talk to MacroView Professional Services (solutions@macroview365.com) before proceeding.

8.1.2 Remove Existing Client

Note: Uninstalling the old and then installing the new is a good practice, however the install package will normally upgrade an installation of a version of **MacroView DMF** from the same series – ie series 6, series 7, series 8.

- Select Start, Control Panel, Add Remove Programs or Programs and Features
- Select **MacroView DMF Client** or **MacroView Message Client** and click on *Remove* or *Uninstall*.

8.1.3 Uninstall all other MacroView products before installing a new version of MacroView DMF

These could include:

- **MacroView Message**
- **MacroView PDF SharePoint Save**
- **MacroView Unique Document Numbering**
- **MacroView Advanced Office Integration**
- **MacroView Precedent**
- **MacroView Enhanced Document Security**
- **MacroView Matters**

8.1.4 Full Uninstall – removing user settings

To do a complete uninstall removing user settings requires two extra steps:

- Remove the registry entry for the user HKCU\Software\MacroView , or else rename HKCU\Software\MacroView\DMF to HKCU\Software\MacroView\DMFold
- Delete the MacroView folder in the users profile – usually this is C:\Users\\AppData\Roaming\MacroView DMF

8.1.5 **Install prerequisites**

The most common problem when upgrading DMF on a client workstation is not installing the required prerequisites.

For [MacroView DMF](#) this means .NET 4.8 See section 7.2

For MS Office this means having the correct versions of VSTO and the .NET Programmability support - see section 7.3.

8.1.6 **Install MacroView DMF**

Install [MacroView DMF](#) followed by the matching versions of your other MacroView software.

8.1.7 **Common problems**

- The most common problem when upgrading DMF on a client workstation is missing prerequisites – see above.
 - After upgrading DMF changing registry keys must be done **after** stopping the [MacroView DMF Local Service](#). Doing so while it is still running has no effect, and the key may even get reset. Note also that Microsoft Outlook and the [MacroView DMF](#) client should also be closed when changing registry keys.
-

9. MacroView DMF Client – General Configuration

9.1 Screen Resolution and DPI

MacroView DMF is designed to be viewed from a screen with a minimum resolution of 1024 X 768.

9.2 What version is installed?

You can confirm the version of MacroView DMF or Message that is installed on your computer by choosing *Options, Support* from the Outlook, *MacroView* ribbon tab (Figure 22).

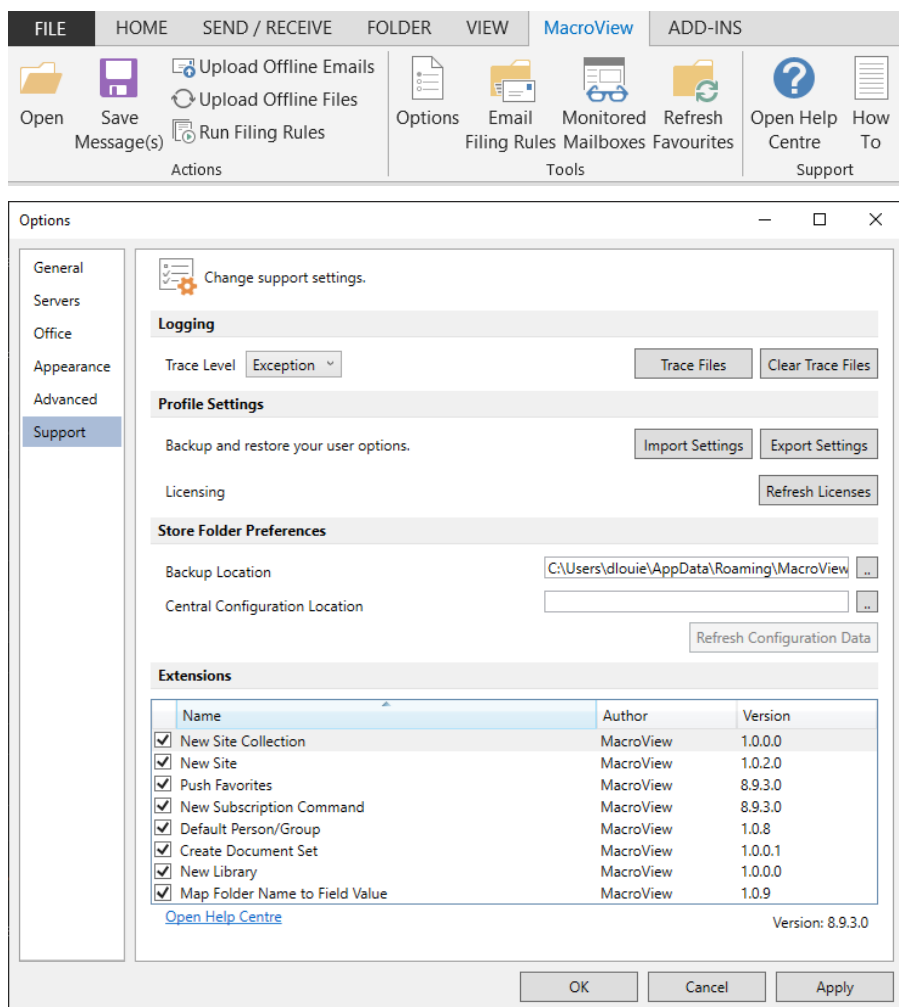


Figure 22: MacroView DMF or Message – Options, Support

You can also choose *File, About* from MacroView DMF Explorer. The MacroView website address, contact phone numbers and support email address are also available from this screen.



Figure 23: MacroView DMF – File, About

9.3 View Trace Files

Clicking this button will navigate you to the folder containing the trace files.

9.4 Clear Trace Files

Clicking this button deletes the error trace files.

9.5 MacroView DMF Help

9.5.1 MacroView DMF Help Centre

You can access the [MacroView DMF Help Centre](#) (Figure 26) by choosing the *Open Help Centre* button on the *Support* group of the *MacroView* ribbon tab in Outlook (Figure 24) or by choosing *File, Info, Help* from *DMF Explorer* (Figure 25).

This site provides access to the Quick Start Guides, Support, Knowledge Base and the latest versions of the products and manuals.

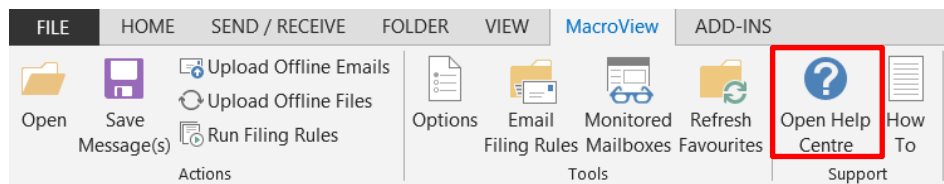


Figure 24: MacroView DMF and Message – Open Help Centre button

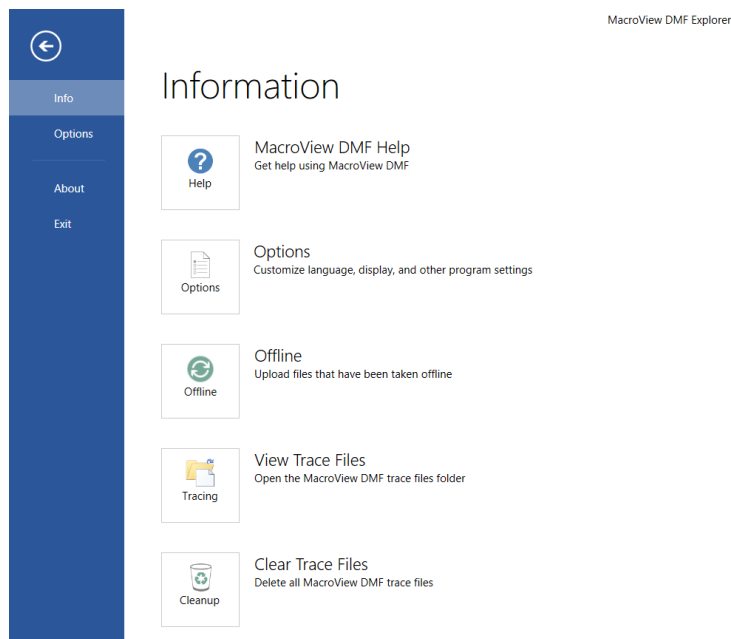


Figure 25: MacroView DMF – File, Info, Help

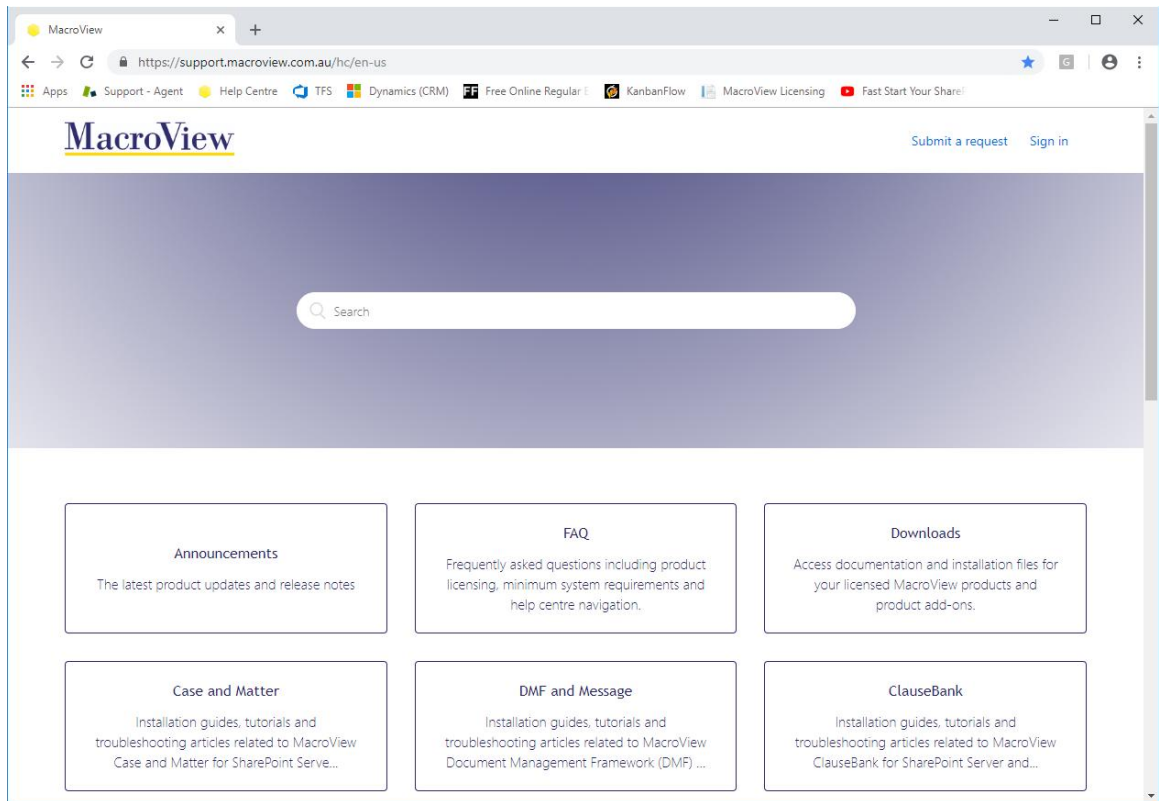


Figure 26: MacroView DMF – Help Centre

9.5.2 MacroView How To

You can access the [MacroView DMF Help Centre Tutorials](#) (Figure 28) by choosing the *How To* button on the *Support* group of the *MacroView* ribbon tab in Outlook (Figure 27).

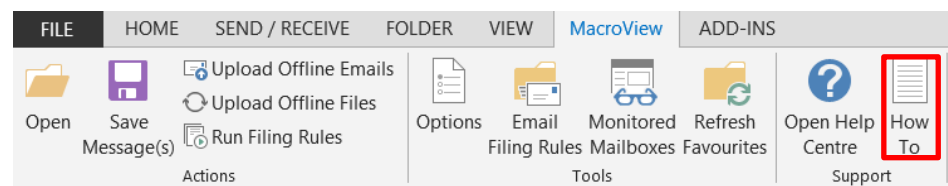


Figure 27: MacroView DMF and Message – How To button

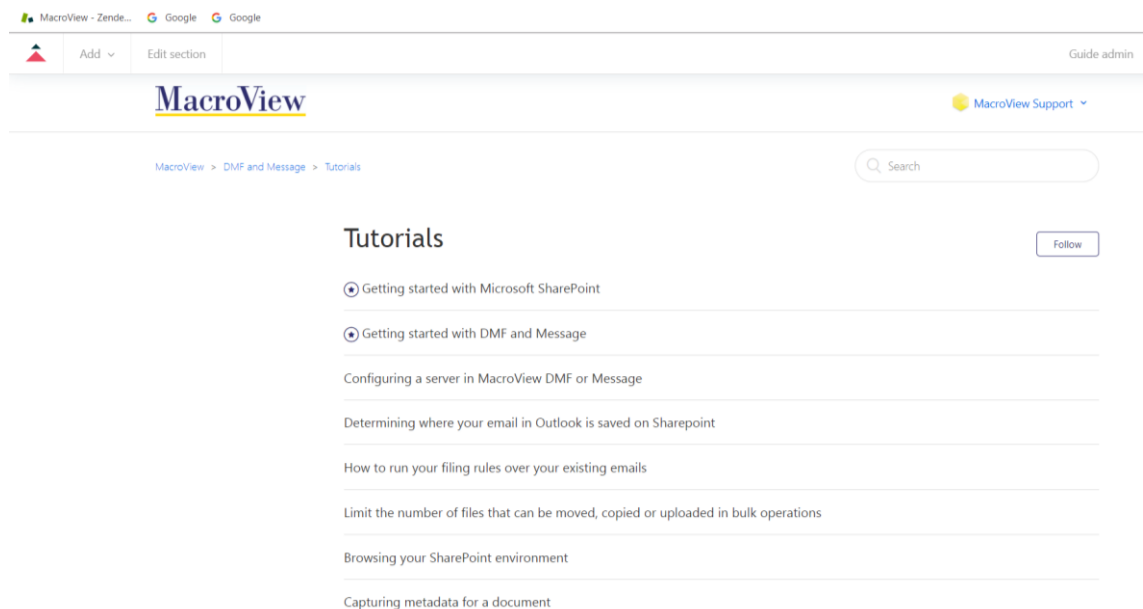


Figure 28: MacroView DMF and Message – Open Tutorials in Help Centre

9.6 Accessing your DMF settings

9.6.1 From MacroView DMF ribbon File tab in MacroView DMF Explorer or the MacroView tab in Outlook

If you click *Options* the MacroView DMF Options dialog will be displayed.

9.6.2 From Windows

You can run the MacroView DMF Setup dialog from Microsoft Windows by using Start, MacroView DMF Setup.

9.6.3 Hidden Settings

Only a subset of the settings are available through the user interface. These hidden settings are usually rolled out with Group Policy as changes to them are not often made by end users.

More detail can be found in section 10.6, however for many of these settings it is wise to contact MacroView Professional Services (solutions@macroview365.com) for assistance rather than experimenting with them.

9.7 Support

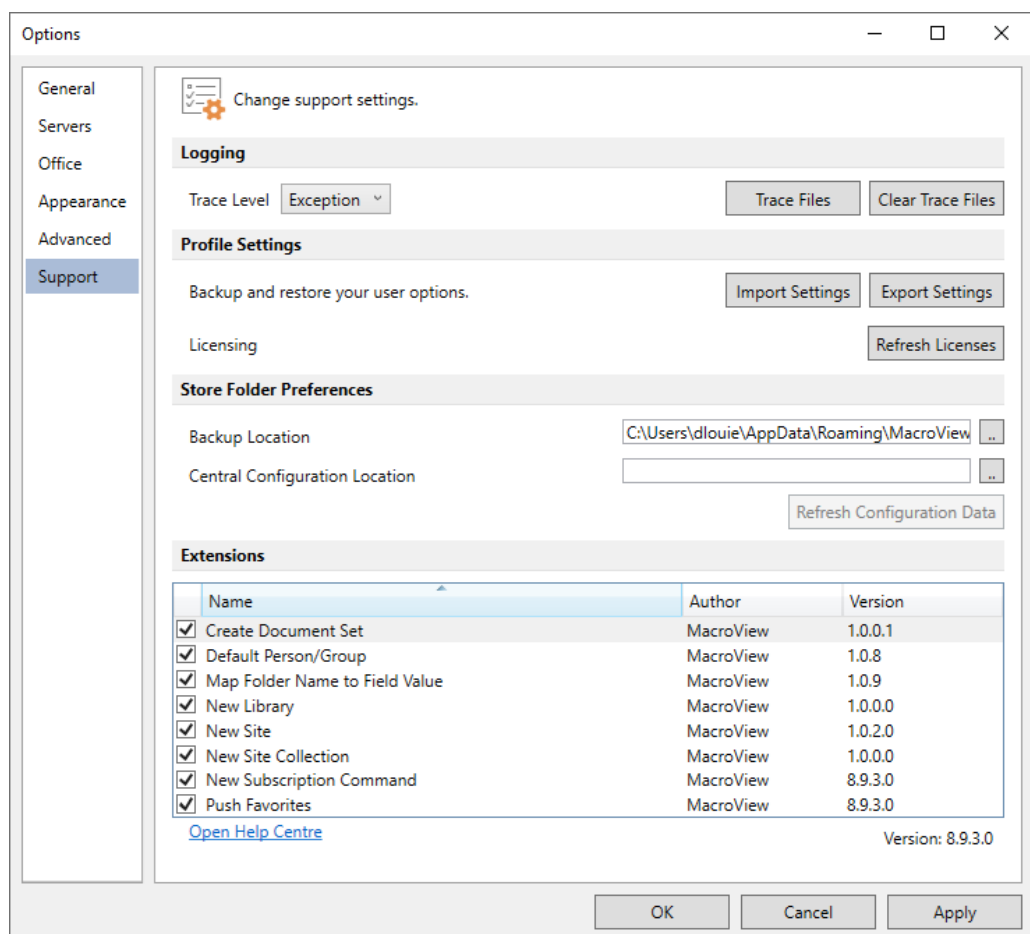


Figure 29: MacroView DMF ribbon tab File, Options, Support

9.7.1 Logging - Trace Level

This MacroView DMF setting can be used to help record and/or diagnose functionality problems. If this setting is enabled MacroView DMF will write trace messages in text files named 'ErrorTraceddmmmyyyy.txt' to:

C:\users\[USERNAME]\AppData\Local\MacroView DMF\Tracing

There is one trace file stored per day.

There are three levels available:

- Exception (default – least verbose)
- Warning
- Information (most verbose)

If Information level logging is enabled a warning message is displayed in the system tray when DMF is started.

9.7.2 **Logging - Trace Files**

Clicking this button will navigate you to the folder containing the trace files.

9.7.3 **Logging - Clear Trace Files**

Clicking this button deletes the error trace files.

9.7.4 **Profile Settings – Backup and restore your user options**

You can click the *Export Settings* button to save a local copy of your MacroView DMF settings. You can then import your previously exported settings by clicking the *Import Settings* button. This has been enhanced to include the contents of the Store folder in the MacroView DMF area of the profile. A useful tool for backing up your Favorites.

9.7.5 **Profile Settings – Licensing**

You can force a licence refresh by clicking on the *Refresh Licenses* button. Any new license changes, including plug-ins, will then be available for use.

9.7.6 **Store Folder Preferences**

Backup location

Select a backup Location where your recents, favorites and other personal configuration files are stored.

Central Configuration Location

Select a location in SharePoint or a Fileshare where DMF will pull down configuration settings from each time it is restarted. If no central configuration location is set DMF will use the configuration files stored under the user's profile.

9.7.7 **Extensions**

This table lists any loaded customisation extensions (developed for DMF 8.0 or later) and their version number.

There are a number of functionality extensions available. The following link provide a list and more detail on the MacroView Help Centre.

<https://support.macroview.com.au/hc/en-us/articles/115009635468-MacroView-DMF-Message-plugins-overview->

Plugins and extensions can turned on and off by ticking and untick the boxes.

Extensions			
	Name	Author	Version
<input checked="" type="checkbox"/>	Map Folder Name to Field Value	MacroView	1.0.3.0
<input checked="" type="checkbox"/>	MacroView DMF Default PersonGroup	MacroView	1.0.6.0
<input checked="" type="checkbox"/>	Push Favorites	MacroView	8.6.16.0
<input type="checkbox"/>	Open With Command	MacroView	1.0.0.0
<input type="checkbox"/>	Create Document Command	MacroView	3.0.7.0
<input checked="" type="checkbox"/>	Archive Matter Command	MacroView	1.0.11.0
<input checked="" type="checkbox"/>	Create New Matter Command	MacroView	1.1.20.0
<input checked="" type="checkbox"/>	Create Library MVCM	MacroView	1.0.0.0

Note: A restart of the local service maybe required for some functionality to be toggled.

Refer to the MacroView Help Centre article on how to enable or disable DMF extensions via Group Policy.

https://macroview.zendesk.com/knowledge/articles/360001368116/en-us?brand_id=2597508

9.8 Ensure that documents open in their native application

MacroView DMF / MacroView Message provides an intuitive tree-view display of the user's SharePoint environment. Clicking on the name of a file in the MacroView file list display causes the file to open. Most users prefer that wherever possible, files open in their native application – e.g. *.docx files open in Microsoft Word, *.xlsx files open in Microsoft Excel, etc.

With SharePoint the default setting on document libraries is that documents will open in their own application. In a document library use Settings, Document Library Settings, Advanced Settings and confirm that the default behaviour for 'Browser-enabled Documents' is set to 'Open in the client application':

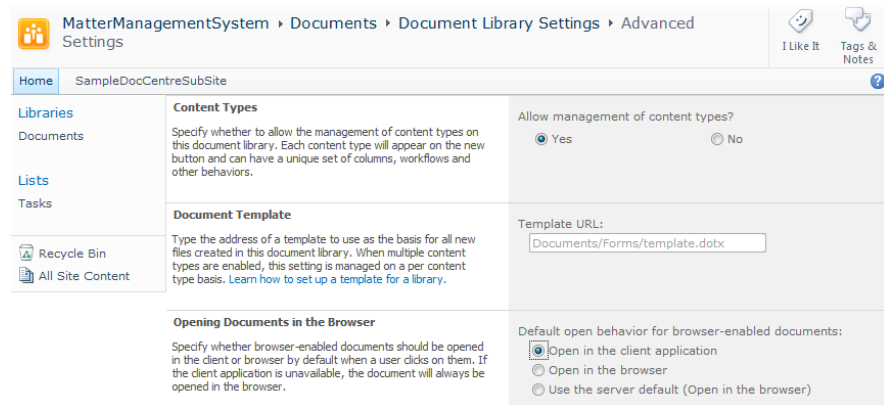


Figure 30: Document Library Settings, Advanced Settings Dialog

In the case of some applications you may need to use the following steps on each client workstation:

- Open Windows Explorer.
- Click Tools, Folder Options, File Types.
- Select an extension (e.g. '.XYZ').
- Click Advanced.
- Ensure that *Browse in same window* is not ticked.
- Repeat for all file types

Note that JPG files will always open in Internet Explorer.

10. MacroView DMF Client – Options

10.1 General

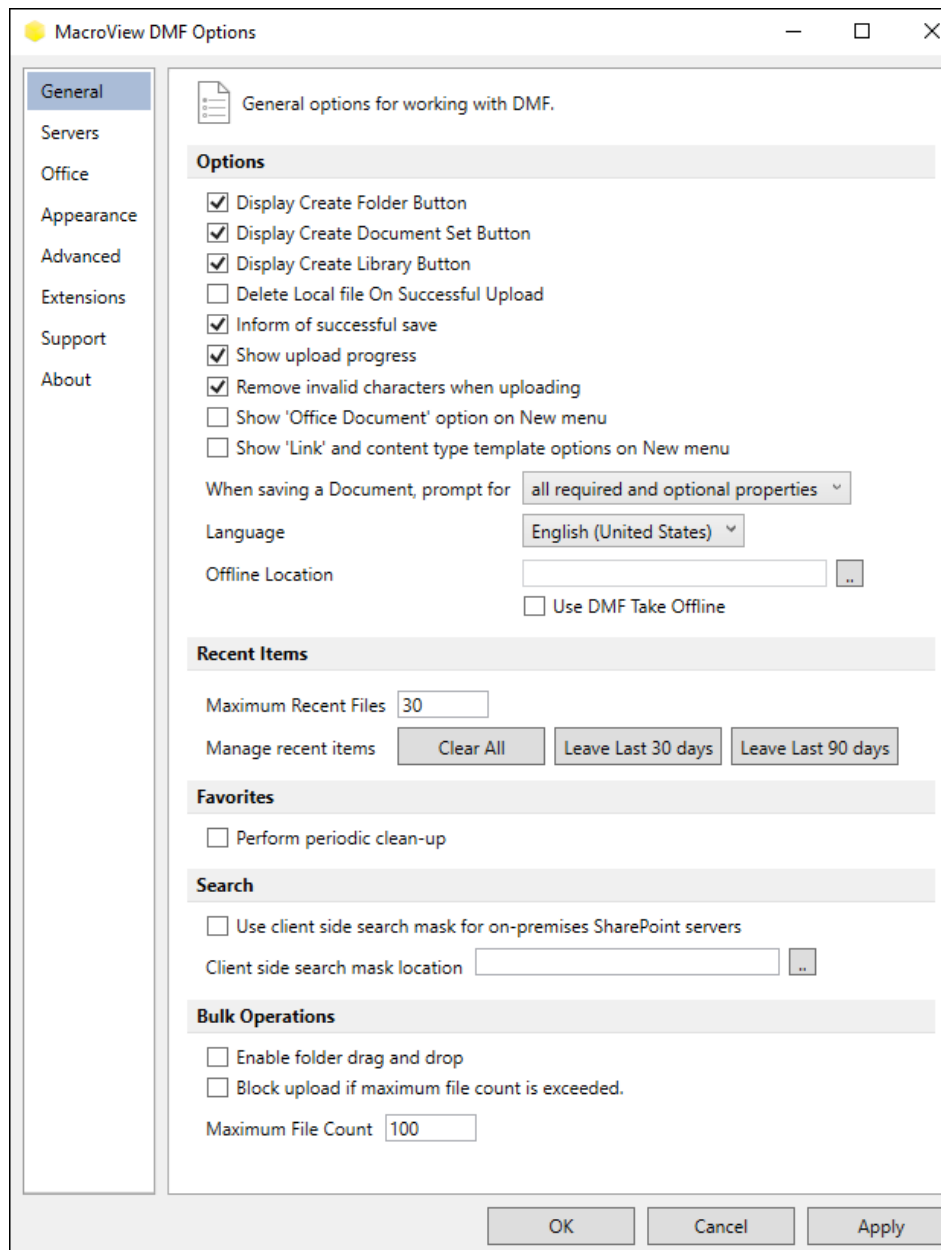


Figure 31: MacroView DMF ribbon tab *File*, *Options*, *General*

10.1.1 Options - Display Create Folder Button

If this setting is enabled, the menu that displays when a library is right-clicked will contain a *Create New Folder* option provided the featured has not been disabled on the SharePoint library.

10.1.2 Options - Display Create Document Set Button

If this setting is enabled, the menu that displays when a library is right-clicked will contain a *Create New Folder* option provided the featured has not been disabled on the SharePoint library.

10.1.3 Options - Display Create Library Button

If this setting is enabled, the menu that displays when a site is right-clicked will contain a *Create New Library* option.

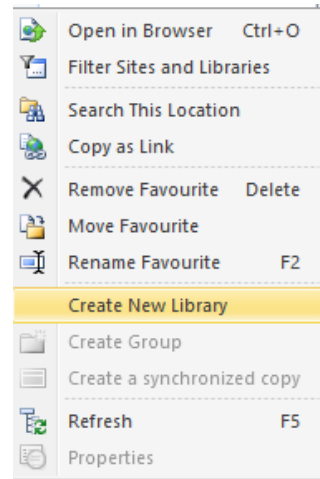


Figure 32: *Create New Library* option displayed in right-click menu.

10.1.4 Options - Delete Local File on Successful Upload

When this option is enabled, files are deleted from Windows when they are successfully uploaded to SharePoint using SharePoint Upload and by dragging and dropping into MacroView DMF Explorer.

10.1.5 Options - Inform of successful save

This setting determines whether MacroView DMF displays a message to inform the user that a message or document was successfully saved to SharePoint.

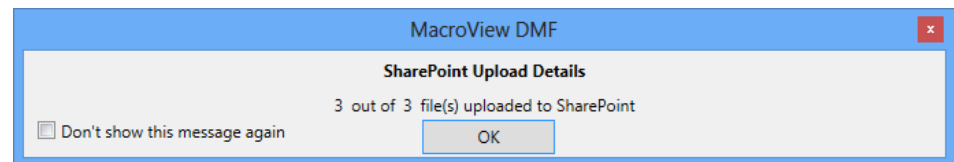


Figure 33: Confirmation message on successful SharePoint Save

10.1.6 Options – Show upload progress.

When this option is enabled DMF will display a dialog show the progress of files that are being uploaded to SharePoint.

10.1.7 Options - Remove invalid characters when uploading

Automatically removes invalid characters from the file name when uploading, characters like # & ! @ . The unstripped filename will be recorded in *Original FileName* column if it is present in the destination Content Type. If your version of SharePoint 2016, 2019 or SharePoint Online supports # and % characters these characters will not be stripped.

10.1.8 Options – Show 'Office Document' option on New menu

When this option is enabled, the New button in MacroView DMF 8.8 or later will include an option to create new documents based on Office templates located in the Shared Template Path. If no Share Template Path has been set then a set of default templates are displayed.

See [this article](#) for more information.

10.1.9 Options – Show 'Link' and content type template options on New menu.

Option to disable the 'New' link and new document in the new drop down that is available on the file list

- 10.1.10 **Options – When saving a Document prompt for**
Defined when the profiling dialog will be displayed when saving documents. The option can be set to *all required and optional properties* (default), *only required properties*, *only required properties with no default values* or *only required and optional properties with no default value*.
- 10.1.11 **Options - Language**
This setting allows you to specify the language used for the user interface.
- 10.1.12 **Options - MacroView Offline Location**
This setting allows you to specify the location that MacroView will download files to when you take them offline. This folder can be on the Desktop, in user's My Documents or the local synchronisation folder for your cloud service provider such as OneDrive or DropBox. Sub-folders will be created in here corresponding to document libraries for which Take Offline is used.
- 10.1.13 **Options – Use DMF Take Offline**
By default DMF uses OneDrive for Business for working offline. Enabling this setting makes *DMF Take Offline* the default functionality.
- 10.1.14 **Recent Items - Maximum Recent Files**
This setting determines how many recent files to keep.
- 10.1.15 **Recent Items – Manage recent items - Clear All**
By clicking the *Clear All* button MacroView DMF will clear out the entire recent file history information that is stored in this user's registry.
- 10.1.16 **Recent Items - Manage recent items - Leave Last 30 days**
By clicking this button MacroView DMF will clear out files from this user's recent file history that haven't been accessed using MacroView DMF in the last 30 days.
- 10.1.17 **Recent Items - Manage recent items - Leave Last 90 days**
By clicking this button MacroView DMF will clear out files from this user's recent file history that haven't been accessed using MacroView DMF in the last 90 days.
- 10.1.18 **Favorites - Perform periodic clean-up**
By ticking this option the size of Favorites.xml is reduced on a periodic basis by collapsing expansions that have not been used recently. This avoids degraded performance cause by excessively large Favorites.xml. By default the period is 30 days.
- 10.1.19 **Search – Use client side search mask for on-premises SharePoint servers**
By ticking this option the client side search mask location will be used to get search panels for all on-premises SharePoint servers.
- 10.1.20 **Search – Client side search mask location**
Select the location where your client side search mask is stored. If a location is provided DMF will copy the search mask file from this location to the local computer each time the DMF local service is started or the search masks are manually refreshed. If the location is left blank or you do not have access to the specified location DMF will continue to use the previous local copy or create a new default mask file if one does not already exist.

For information on Search masks refer to MacroView DMF and MacroView Message search panels article <https://support.macroview.com.au/hc/en-us/articles/115001620594>.
-

10.1.21 **Bulk Operations – Enable folder drag and drop**

Ticking this option will mean that DMF allows you to drag an entire folder or group of folders to Sharepoint.

See [this article](#) for more information

10.1.22 **Bulk Operations – Block upload if maximum file count is exceeded**

Ticking this option will mean that DMF will prevent the bulk operation if there are more items selected than the *Maximum file count*. When it is unchecked DMF displays a warning message asking the user to confirm that they want to proceed.

10.1.23 **Bulk Operations - Maximum file count**

This allows you to set the maximum number of files you can upload to SharePoint using MacroView DMF at one time. By default the maximum file count limit is 30.

10.1.24 **Registry Keys Relating to *Options* – *General***

The relevant registry keys can be managed through Group Policy settings and are located in HKCU\Software\MacroView\DMF\UserOptions.

For details about the relevant registry key configuration settings refer to the UserOption tab in the Excel Spreadsheet, [MacroView DMF ADMX](#), provided on the [MacroView DMF](#) download site.

10.2 Office

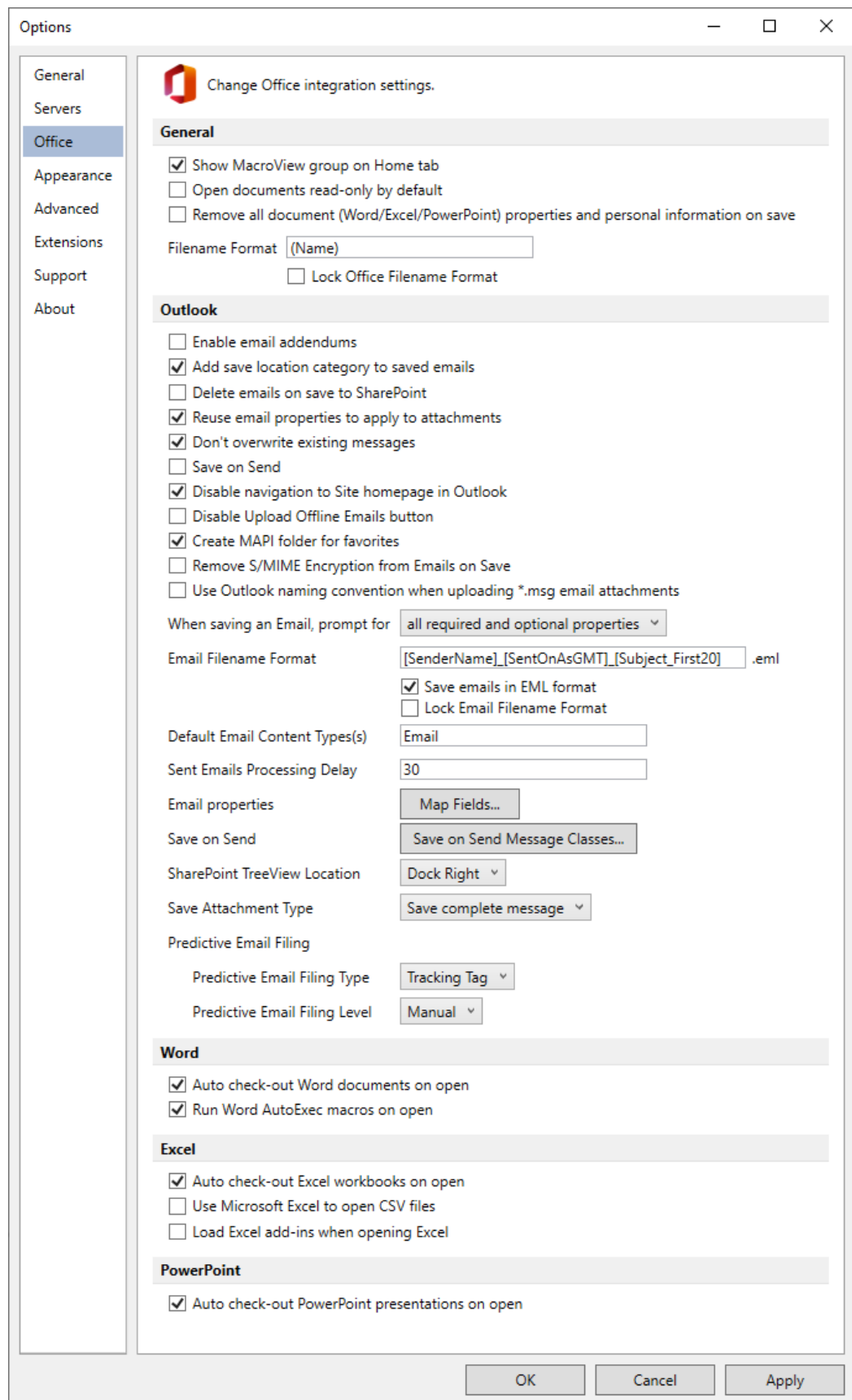


Figure 34: MacroView DMF ribbon tab File, Options, Office

10.2.1 **General – Show MacroView group on Home tab**

Displays the *MacroView* group on the *Home* tab in the ribbon. The [MacroView DMF Open from SharePoint](#) and [Save As to SharePoint](#) buttons are available from this group.

10.2.2 **General –Open documents read-only by default**

Removes the Open Read Only option from the right-click menu on the file list and changes the action of the Open option (or double click) to open the document read-only

10.2.3 **General – Filename Format**

The Office Naming Convention can be used to provide a standard naming convention when using MacroView DMF to save Excel, Word and PowerPoint files from within Office.

By default the filename is (Name). The filename can be customised to include any of the following information:

- (Name)
- (Author)
- (Title)
- (Created_ddmmyy)
- (Created_yyyymmdd)
- (Created_ddmmyy_NoTime) – e.g. 07Jun11
- (Created_yyyymmdd_NoTime) – e.g. 20110607

10.2.4 **General – Lock Office Filename Format**

Prevents users from modifying the filename when a format has been defined as described in 10.2.3 above.

10.2.5 **General – Remove All Document Properties On Save**

Remove all document(Word,Excel, Powerpoint) properties and personal information on save. [See more...](#)

10.2.6 **Outlook - Enable email addendums**

This functionality adds an addendum (additional text signature) to the end of an email when it is saved from Outlook to SharePoint using [MacroView DMF](#).

Figure 35 below is a sample email addendum resulting when the *Enable Email Addendums* option is checked. Clicking on the hyperlink will open the library wherein the message is saved.

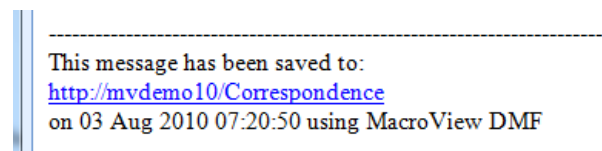


Figure 35: Addendum inserted into email by [MacroView DMF](#)

The above is the default addendum format. Custom assemblies defining different addendums and approaches can also be created. Consult MacroView Professional Services (solutions@macroview365.com) for assistance.

10.2.7 **Outlook – Add save location to category to saved emails**

This setting allows the user to add/remove the URL in the category when saving an email. [See more...](#)

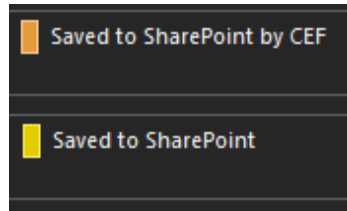


Figure 36: Category without SharePoint locations

10.2.8 Outlook - Delete emails on save to SharePoint

This setting determines whether **MacroView DMF** will automatically delete emails from Microsoft Outlook after they have been successfully saved to SharePoint.

10.2.9 Outlook - Reuse email properties to apply to attachments

This option allows email attachments that are saved to SharePoint by clicking the *Save Attachments* button to be saved with the metadata of the email, such as To, From, Sent On, Importance, Sensitivity etc.

Note that provided the Email content type is defined and available in the destination library (see 10.2.20), then emails can also be dragged from the inbox or other Outlook folder directly to the library or folder in the DMF tree view, and that same metadata will automatically be applied.

10.2.10 Outlook - Don't overwrite existing messages

If this setting is ticked, MacroView will check if the email has already been saved to this location and will not save it again. The yellow *Saved to SharePoint* category will be applied to the email in Outlook.

If this setting is not ticked MacroView will attempt to save the email to this location. If the email already exists in this location, the user will be given the option to replace it. The yellow *Saved to SharePoint* category will be applied to the email in Outlook if you replace it.

This setting should be ticked to create a zero-profiling experience for email saving.

10.2.11 Outlook - Save on Send

The *Save on Send* setting determines if a user will be prompted to save sent emails. Note that if an email already satisfies a DMF sent email rule, the user will not be prompted, as the rule has precedence.

10.2.12 Outlook - Disable navigation to Site homepage in Outlook Explorer

Prevents Outlook from displaying the site homepage when a site is selected in the tree-view. When enabled, if mousing down the tree a call will go out to show the site in the browser embedded in Outlook.

In DMF 8.4.1317 or later this setting has no affect and navigation to site home pages is always disabled unless Outlook security has been configured to *EnableRoamingFolderHomepages*.

10.2.13 Outlook - Create MAPI folder for favorites

When this setting is enabled and a MacroView DMF Favorite is added a corresponding folder will be created in the Mail Folders area within the <SharePoint> folder. These folders are visible on a mail app in a mobile phone you can commence the saving of emails. This process is completed when next you log into your Microsoft Outlook desktop.

10.2.14 **Outlook – Remove S.MIME Encryption from Emails on Save**

If enabled and the user has the required certificate S/MIME encryption will be removed from the email before it is saved to SharePoint.

10.2.15 **Outlook - Use Outlook naming convention when uploading *.msg mail attachments**

If enabled, the naming convention used for Outlook messages will be used to create the default name for any attached *.msg email messages.

10.2.16 **Outlook – When saving an Email prompt for**

Defined when the profiling dialog will be displayed when saving emails. The option can be set to *all required and optional properties* (default), *only required properties*, *only required properties with no default values* or *only required and optional properties with no default value*.

10.2.17 **Outlook – Email Filename Format (formerly ‘Outlook Format’)**

This section of [MacroView DMF Settings](#) will be greyed out if it is set by your DMF Group Policy.

The *Format* value is the default email naming system that you want to use when saving emails from Outlook into SharePoint. The current default has been selected because it is a good way of achieving informative and unique email naming as it is unlikely that one user would send two different emails in the space of one second with the same subject.

By default the email filename is in DMF 8.7.19 or earlier is:

[SenderName]_[SentOn]_[Subject_First20]

e.g. Evan Williams_06Apr06 09.28.26_SharePoint consulting job

In version of DMF later than 8.7.19, to further reduce the possibility of a duplicates email being saved when users are in different time zones, the default email filename is:

[SenderName]_[SentOnAsGMT]_[Subject_First20]

e.g. Evan Williams_06Apr2006 09.28.26_SharePoint consulting job

The filename can be customised to include any of the following information:

- [SentOnToMillisecond]
 - [CreationTimeToMillisecond]
 - [SentOn]
 - [SentOnAsDbf]
 - [SentOnAsHex]
 - [SentOnAsGMT]
 - [SentOnAsGMTHex]
 - [SentOnAsGMTDbf]
 - [SentOn_YY-MM-DD_NoTime]
 - [SentOn_YY MM DD_NoTime]
 - [SentOn_YYYY-MM-DD_NoTime]
 - [SentOn_YYYY MM DD_NoTime]
 - [SentOn_YY-MM-DD_WithTime]
 - [SentOn_YY MM DD_WithTime]
 - [SentOn_YYYY-MM-DD_WithTime]
 - [SentOn_YYYY MM DD_WithTime]
 - [SentOnAsGMT_YY-MM-DD_NoTime]
 - [SentOnAsGMT_YY MM DD_NoTime]
 - [SentOnAsGMT_YYYY-MM-DD_NoTime]
 - [SentOnAsGMT_YYYY MM DD_NoTime]
 - [SentOnAsGMT_YY-MM-DD_WithTime]
-

- [SentOnAsGMT_YY MM DD_WithTime]
- [SentOnAsGMT_YYYY-MM-DD_WithTime]
- [SentOnAsGMT_YYYY MM DD_WithTime]
- [SenderName]
- [SenderNameAsHex]
- [SentOnBehalfOfName]
- [SentOnBehalfOfNameAsHex]
- [To]
- [ToAsHex]
- [CreationTime]
- [CreationTimeAsDbf]
- [CreationTimeAsHex]
- [Importance]
- [Size]
- [Subject]
- [SubjectAsHex]
- [Subject_First#] (where # is any number from 1 to 99)
- [Subject_First#AsHex] (where # is any number from 1 to 99)

Note: When [Subject_First#] is used in the Outlook Format the actual number of characters used is # less any invalid characters that are removed.

DMF
v8.7

In versions of MacroView DMF and Message later than 8.7.141 you can use any date and time format supported by .NET in the email filename format. Refer to this Help Centre article for more information:

<https://support.macroview.com.au/hc/en-us/articles/115002827827>

DMF
v8.7

MacroView DMF and Message 8.7.141 and later allow you to include some fixed or static text in the filename. To include fixed text in the email filename enter [Text_abc] in the required location in the *Email Filename Format* field in the MacroView. Options, Office tab, where abc is the required fixed text. For more detail click [this link](#) to the Help Centre article.

Note: When *Don't overwrite existing messages* is enabled, if the email save format is MSG and a file with the same filename and either an .msg or .eml file extension exists the email is considered a duplicate and is not saved.

10.2.18 **Outlook – Save emails in EML format**

Changes the format of emails saved to SharePoint when using **DMF** or **Message** from *.msg to *.eml.

Note: When *Don't overwrite existing messages* is enabled, if the email save format is MSG and a file with the same filename and either an .msg or .eml file extension exists the email is considered a duplicate and is not saved.

10.2.19 **Outlook - Lock Email Filename Format**

Prevents users from modifying the filename when saving messages from Outlook. Use this to guarantee consistency with email naming across the organisation.

10.2.20 **Outlook - Default Email Content Type(s)**

This option allows you to specify the name of a SharePoint Content Type(s) that you want MacroView to use when you save emails to a library via drag and drop. By default, this is set to *Email*, which is a Content Type available in the MacroView Library Templates that ship with **MacroView DMF**.

Enter multiple email content types separated by the vertical pipe “|” character.

- 10.2.21 **Outlook - Sent Items Process Period**
DMF compares the SentOn time of the email with the current time on the local PC and if the difference is greater than 30 seconds any Outgoing email filing rules are not triggered..
- 10.2.22 **Outlook - Email Properties**
MacroView DMF/ Message 8.9.1343 and later -Automatically sets email properties to non-MacroView columns when an email is saved to SharePoint via MacroView DMF or MacroView Message. [See More...](#)
- 10.2.23 **Outlook - SharePoint TreeView Location**
MacroView DMF/ Message 8.9.1343 and later - Allows a user to disable the Save prompt for meeting requests(and other Outlook events) when Save on Send is switched on. [See more....](#)
- 10.2.24 **Outlook - SharePoint TreeView Location**
The default location for the MacroView Pane in Microsoft Outlook is on the right of the Mail window. You can locate the MacroView Pane in In the Navigation Bar to the left of the Mail window, under the Mail Folders pane.
- 10.2.25 **Outlook - Save Attachment Type**
Gives users the ability to split off attachments and save them separately when saving individual email messages from Outlook to SharePoint.
■ The available options are documented in the *Splitting Attachments from their Emails* section of the User Guide.
- 10.2.26 **Predictive Email Filing Type**
Defines whether MacroView Tracking Tags or User-defined Tags are in use when MacroView Predictive Email Filing is licensed and enabled. Refer to the MacroView Predictive Email Filing (PEF) user Guide for more information.
- 10.2.27 **Predictive Email Filing Level**
When MacroView Predictive Email Filing is licensed and enabled this defines if incoming and outgoing emails that contain tracking tags are filed automatically, semi-automatically or manually. Refer to the MacroView Predictive Email Filing (PEF) user Guide for more information.
- 10.2.28 **Word– Disable auto check-out on open**
When this setting is enabled, files opened from SharePoint for editing will NOT be checked out. Otherwise they are checked out automatically.
- 10.2.29 **Word– Word AutoExec macros on open**
Execute Word auto-exec macros if they exist when opening Word documents.
- 10.2.30 **Excel – Use Microsoft Excel to open CSV files**
If this setting is enabled CSV files will be explicitly opened in Excel regardless of what the file association/MIME type is.
- 10.2.31 **Excel– Disable auto check-out on open**
When this setting is enabled, files opened from SharePoint for editing will NOT be checked out. Otherwise they are checked out automatically.
-

10.2.32 **Word, Excel PowerPoint – Load Excel add-ins when opening Excel**

Execute Excel auto-exec macros if they exist when opening Excel files.

10.2.33 **PowerPoint– Disable auto check-out on open**

When this setting is enabled, files opened from SharePoint for editing will NOT be checked out. Otherwise they are checked out automatically.

10.2.34 **Registry Keys Relating to *Options* – *Office***

The relevant registry keys can be managed through Group Policy settings and are located in HKCU\Software\MacroView\DMF\UserOptions.

For details about the relevant registry key configuration settings refer to the UserOption tabs in the Excel Spreadsheet, [MacroView DMF ADM](#), provided with the ADM file on the [MacroView DMF](#) download site.

10.3 Appearance

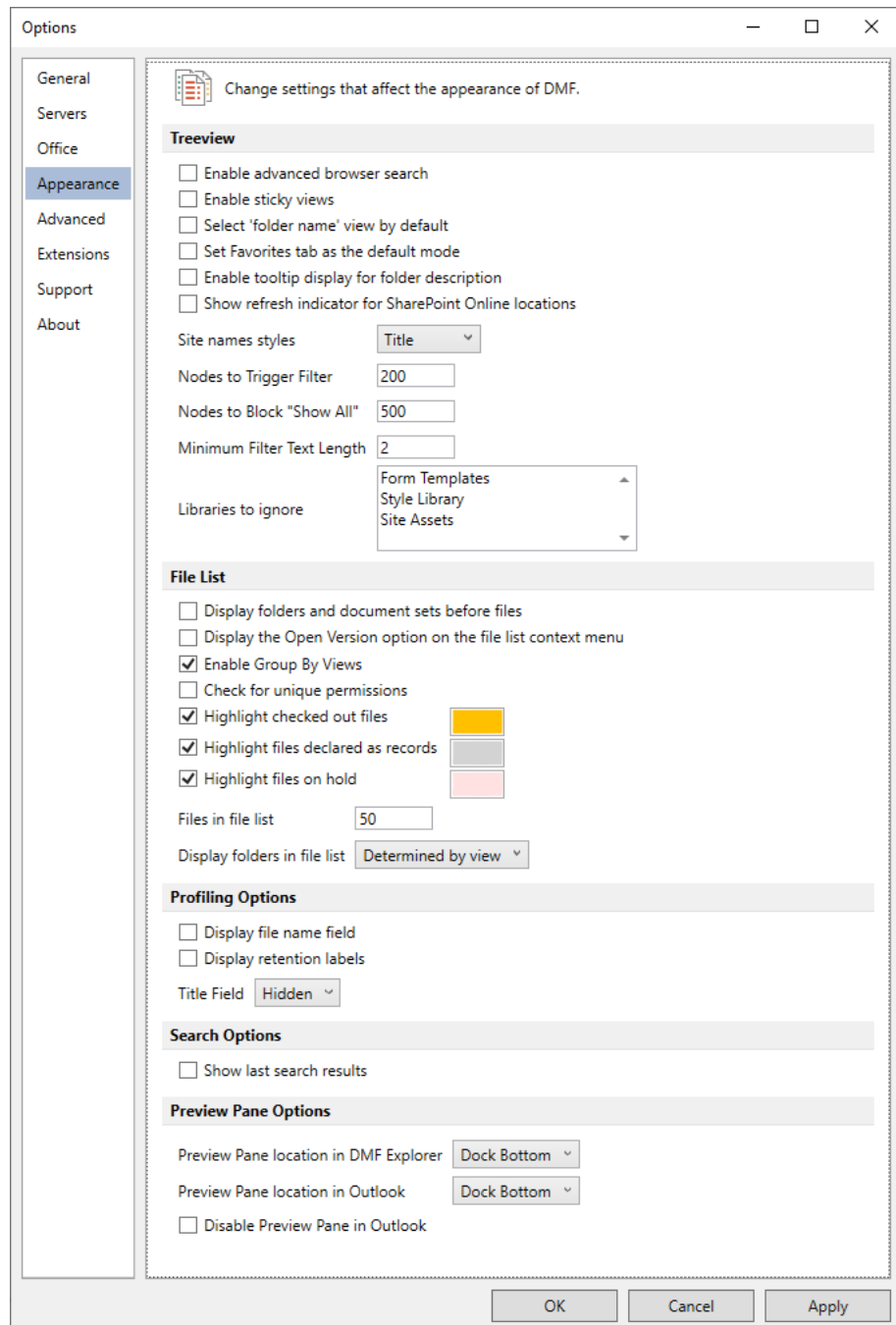


Figure 37: MacroView DMF ribbon tab File, Options, Appearance

10.3.1 Treeview – Enable advanced browser search

If this option is enabled, users will see a *Search* option when they right-click a node in the tree view. Selecting this will open Internet Explorer and navigate them to the default SharePoint Search page or to the page specified in the *Search re-direction page* setting in the *MacroView DMF* web service configuration.

10.3.2 Treeview – Enable sticky views

If set the view name will be remembered between libraries. When moving from one library to the next if the destination library has a view matching the one selected in the previous library that view will be automatically selected.

10.3.3 **Treeview – Select ‘folder name’ view by default**

If set and the name of the selected folder or document set matches a view name in the library, the view will be automatically selected. This includes where the view matches the folder or document set name with an ‘s’. For example if the folder name is ‘Email’ the ‘Email’ or ‘Emails’ view will be selected.

Note: Sticky views takes precedence over this setting.

10.3.4 **Treeview – Set Favorites tab as the default mode**

If set, the default mode for the tree view (on startup) will be Favorites.

10.3.5 **Treeview – Enable tooltip display for folder description**

If set, DMF displays a tooltip (if defined) when hovering over a folder in the tree-view with the mouse.

The above is a customization. Consult MacroView Professional Services (solutions@macroview365.com) for assistance.

10.3.6 **Treeview – Show refresh indicator for SharePoint Online locations**

New nodes created will display a refresh icon next to the parent node . [See more...](#)

10.3.7 **Treeview – Enable navigate to last location on refresh**

When the tree is refreshed, DMF will navigate to the last location, expanding the tree as required. Otherwise the tree will be collapsed after the Refresh.

10.3.8 **Treeview – Site names style**

This setting controls the way sites are identified in the [MacroView DMF](#) tree-view display. It provides options for sites to be displayed in the tree-view using their Title, their URL address or both. The default is *Title*.

10.3.9 **Treeview – Nodes to Trigger Filter**

This is the number of nodes that [MacroView DMF](#) will display within a SharePoint server/tenant, site collection, site, library, document set or folder without prompting the user to apply a filter to the site or site collection. The initial setting is 200.

10.3.10 **Treeview – Nodes to Block ‘Show All’**

[MacroView DMF](#) is designed to cope efficiently with very large SharePoint environments. If the number of nodes specified in this option exists at one level of the tree (excluding hub site nodes), then the ‘Show All’ button on the Filter dialog will not be displayed. This will force users to filter in locations with a large number of nodes and help to avoid timeouts. The initial setting is 500.

10.3.11 **Treeview – Minimum Filter Text Length**

This is the minimum number of characters that the user may enter as the filter criterion in the Filter dialog. The initial setting is 2.

10.3.12 **Treeview – Libraries to ignore**

Allows you to specify SharePoint libraries that you don’t want to appear in the tree-view. This information is stored locally on each workstation in:

C:\Users\[USER]\AppData\Roaming\MacroView DMF\Store\TreeNodesToHide.xml

This setting is disabled if the libraries to be ignored have been defined in the central configuration location.

- 10.3.13 **File List – Display the Open Version option on the file list context menu**
Show the 'Open Version' option when right-clicking on a file in the file list.
- 10.3.14 **File List – Enable Group By Views on SharePoint Online**
If the selected view is a Group By View, display the groups instead of showing all files in a flat list. See Group by View on SharePoint Online for more information.
[See article](#) for more details.
- 10.3.15 **File List – Check for Unique Permissions**
Files that contain unique permissions will have a key overlay icon.
[See article](#) for more details.
- 10.3.16 **File List – Display folders and document sets before files**
*MacroView DMF displays the order of folders, documents sets and files differently depending on whether or not the option **Display Folders and Document sets to the top of the list** is checked on or off in **MacroView DMF File, Options, Appearance**.*
*If this setting is enabled, Folders and Document Sets are displayed in the **MacroView DMF** file list in the same order as they appear in the tree-view. ie no files will appear intermingled with the Folders and Document Sets.*
Note that if the library is based on a custom list definition this setting is not supported.
- 10.3.17 **File List – Files in file list**
This is the maximum number of files for which **MacroView DMF** will retrieve details for display in the File List at the same time. **MacroView DMF** performs a 'choked' retrieval, which ensures good performance and efficient usage of bandwidth when accessing document libraries and folders that contain a large number of files. Where the number of files available exceeds this setting, a 'More Files...' button appears at the bottom right hand corner of the File List screen. The initial setting is 50.
- 10.3.18 **File List –Highlight checked out / on-hold / declared record files**
Highlight files in the file list that are checked out, on-hold or declared as a record with a background color of your choice. Check the option to enable it and click on the color swab to set the color.
- 10.3.19 **File List – DisplayFoldersInFileList**
From DMF/Message 8.9.1210 and later
Setting will determine how folders will be displayed in the file list. Options are "Determined by View", "Always", "Never" [See more...](#)
-

10.3.20 Profiling Options – Display file name field

MacroView DMF enables the display and editing of the file name in the profiling dialog.

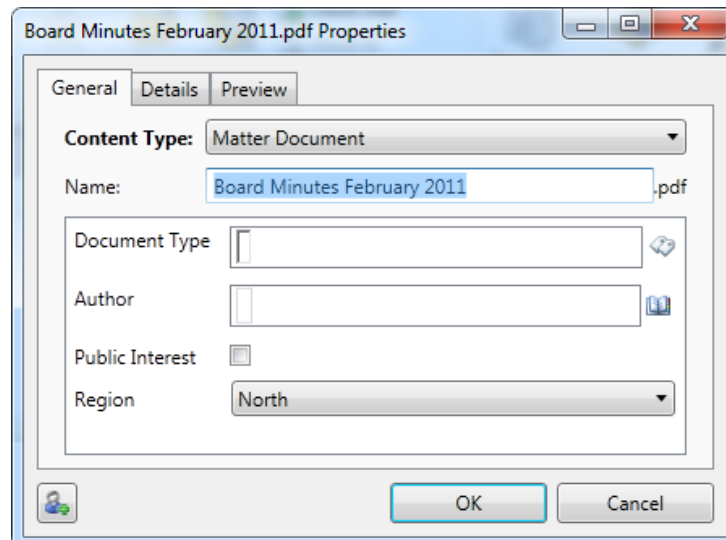


Figure 38: Profiling dialog - File Name field highlighted.

10.3.21 Profiling Options – Title field

MacroView DMF provides a configuration setting called Title Field, which corresponds to the Registry key DMF\UserOptions\TitleFieldVisibility. The Title Field setting has three valid values:

- *Hidden* (Registry value 0 – default) Never display the Title column in Profiling dialogs. This was the behaviour of previous versions of DMF.
- *Show* (Registry value 1) – Display Title in the Profiling dialog if that dialog needs to be displayed for some other reason.
- *Always Show and Prompt* (Registry value 2). Always display Title column in the DMF Profiling dialog.

10.3.22 Preview Pane option – Preview Pane in DMF explorer

You can select the location of the document preview pane in DMF Explorer to be one of the following:

- Dock Bottom = Below the file list (default location)
- Dock Right = Right of the file list for use on newer wide screen monitors.

10.3.23 Preview Pane option - Preview pane in Outlook

You can select the location of the document preview pane in Microsoft Outlook to be one of the following:

- Dock Bottom = Below the file list (default location)
- Dock Right = Right of the file list for use on newer wide screen monitors.

10.3.24 Preview Pane option - Disable preview pane in Outlook

Suppresses the preview pane in Outlook. Useful when screen size is small, or if viewing over a lower bandwidth connection.

10.3.25 Search options – Show last search results

If this setting is enabled, when the user switches to Search mode, the last used search will be re-run and its results displayed before the user can enter any new search criteria.

Registry Keys Relating to *Options – Appearance*

The relevant registry keys can be managed through Group Policy settings and are located in HKCU\Software\ MacroView\DMF\UserOptions.

For details about the relevant registry key configuration settings refer to the UserOption tabs in the Excel Spreadsheet, [MacroView DMF ADMX](#), provided with the ADMX file on the MacroView DMF download site.

10.4

Advanced

MacroView DMF/Message introduces settings that were only able to be set in the registry or the group policy.

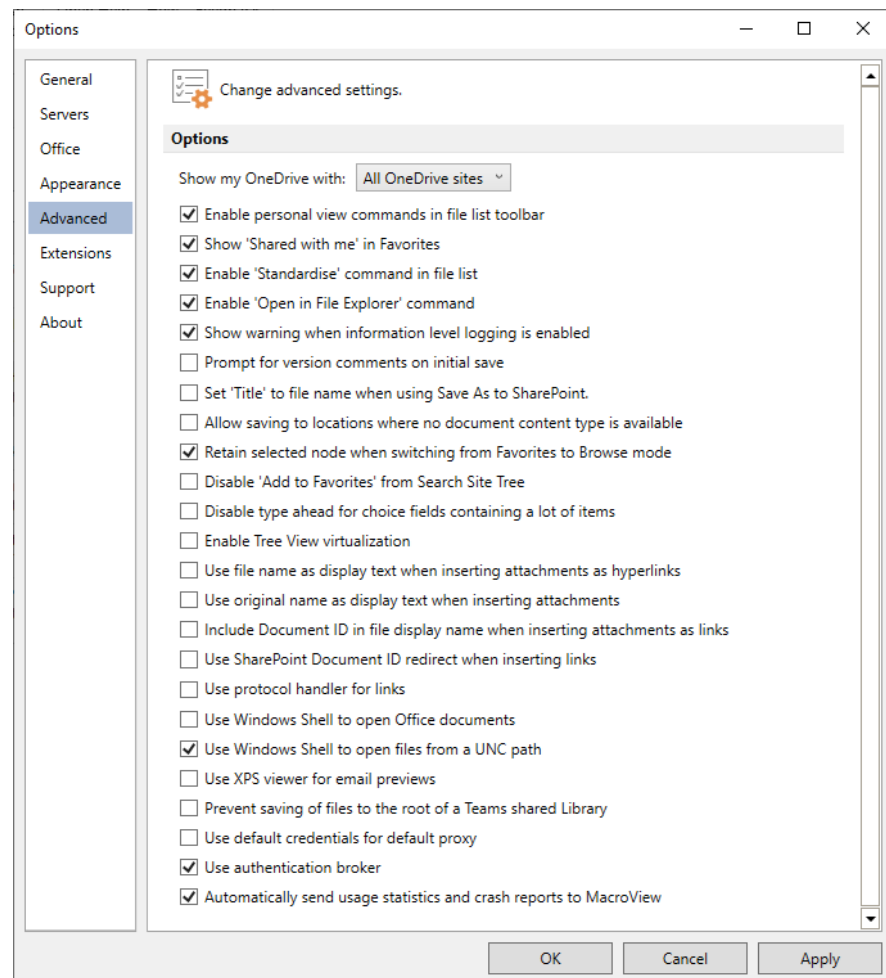


Figure 39-Advanced tab

- 10.4.1 **Show OneDrive sites**
Select which users personal sites are displayed when a OneDrive for Business server is register in the the MacroView DMF tree view. See Limit the OneDrive personal sites displayed to just the current user for more information.
- 10.4.2 **Enable personal view commands in the file list toolbar**
Enable the creation of personal views from the file list toolbar. See Personal Views for more information.
- 10.4.3 **Show OneDrive sites**
Include the 'Shared with me' node in Favorites mode that list the files and location that have been shared with the current user by users within an outside the organisaton. See View files and location that have been 'Shared' with me for more information.
- 10.4.4 **Show warning when information level logging is enabled**
Information level logging which is set under Options > support is used to troubleshoot issues by recording additional information for each action taken in MacroView DMF. This is very useful for troubleshooting but has an impact on overall performance due to the amount of information being written to the trace files. Enabling this setting will result in a system tray warning message being displayed if you start MacroView DMF and have Information Level logging enabled.
- 10.4.5 **Prompt for version comments on initial save**
Prompt the user to provide version comments when saving a new document.
- 10.4.6 **Set 'Title' to file name when using Save As to SharePoint**
Automatically set the Title attribute to the filename when saving a document using Save As to SharePoint.
- 10.4.7 **Allow saving to locations where no document content type exists**
Allow saving to locations where no document content type is available.
- 10.4.8 **Retain selected node when switching from Favourites to Browse mode**
The current node selected in Favourites mode will be re-selected automatically after the user switches to Browse mode.
- 10.4.9 **Disable 'Add to Favourites' from Search Site Tree**
Do not allow adding search site tree search results to Favorites.
- 10.4.10 **Disable type ahead for choice fields containing a lot of items**
Display choice fields with more than 20 values as a dropdown list. When this is not enabled (default) choice field with more than 20 values reverts to a typeahead style list.
- 10.4.11 **Enable Tree View virtualization**
Use virtualization to displays the sub-tree for a node being expanded. This can improve performance in some environments. This option MUST be enabled if you are running MacroView DMF on an computer that uses an ARM processor.
- 10.4.12 **Use file name as display text when inserting attachments as hyperlinks**
Use the file name rather than the URL as the display text for hyperlinks when using Insert As, Link.
-

- 10.4.13 **Use original name as display text when inserting attachments**
Use Original Filename (if available) as the display text rather than the filename when retrieving a document from SharePoint and inserting it as an attachment when the filename has been stripped of illegal characters.
- 10.4.14 **Include Document ID in file display name when inserting attachments as links**
Include the Document ID in the display name for the file when inserting attachments as links.
- 10.4.15 **Use SharePoint Document ID redirect when inserting links**
Hyperlinks created by using Insert As, Link and Insert Attachment as Link will be a link to the DocId Redirection Page (DocIdRedir.aspx) with the unique Document ID as a parameter. These links will still work even after the document has been moved from where it was originally saved.
- 10.4.16 **Use protocol handler for links**
Hyperlinks created by using Insert As, Link and Insert Attachment as Link will have a dmf: prefix. This will trigger the DMF Protocol Handler, so that clicking the hyperlink causes the same actions as opening the location or file from MacroView DMF.
- 10.4.17 **Use Windows Shell to open Office Documents**
Passes the opening of a document directly to the application. This can minimize the application load time and ensure the application splash screen is displayed while it loads. This performs the same operation as using the Open With.. option in the file list right click menu.
- 10.4.18 **Use Windows Shell to open files from a UNC path**
Opening non office files through their native application instead of downloading the file and opening it.
- 10.4.19 **Use SharePoint ActiveX control for opening files**
Open files via their native application, rather than via the browser. This provides more functionality but will also trigger security warnings (e.g. from virus scanners).
- 10.4.20 **Use SharePoint ActiveX for open-read-only**
Files opened read-only will be opened via their native application, rather than via the browser. This provides more functionality but will also trigger security warnings (e.g. from virus scanners).
- 10.4.21 **Use SharePoint ActiveX control for opening PDF files**
Open PDFs via their native application, rather than via the browser. This provides more functionality (e.g. for password protected PDFs) but will also trigger security warnings (e.g. from virus scanners).
- 10.4.22 **Use XPS viewer for email previews**
Previews of all file types are handled by the XPS facility of .Net. (note: XPS does not support the previewing of certain types of emails). When not set MacroView DMF will use Aspose to display the preview of emails stored in SharePoint. (note: Aspose generated previews do not allow printing, searching or zooming).
- 10.4.23 **Use Default Credentials For Default Proxy**
The 'UseDefaultCredentialsForDefaultProxy' advanced setting will set the default credentials for the default proxy when enabled.
-

10.4.24 **Use Authentication Broker**

Enables Windows WAM broker usage in MSAL, if supported on the current platform. This setting exists so that broker usage can be disabled if there is a problem with it on the host machine. [See more...](#)

10.4.25 **Automatically send usage statistics and crash reports to MacroView**

An optional way to provides MacroView with information about how DMF is being used to improve the product in future versions.

10.5 Servers

From Macroview DMF/Message 9.0 and later, adding a SharePoint online server has been updated to an easier and more convenient way

[See more...](#)

When adding a sever this window will begin the process.

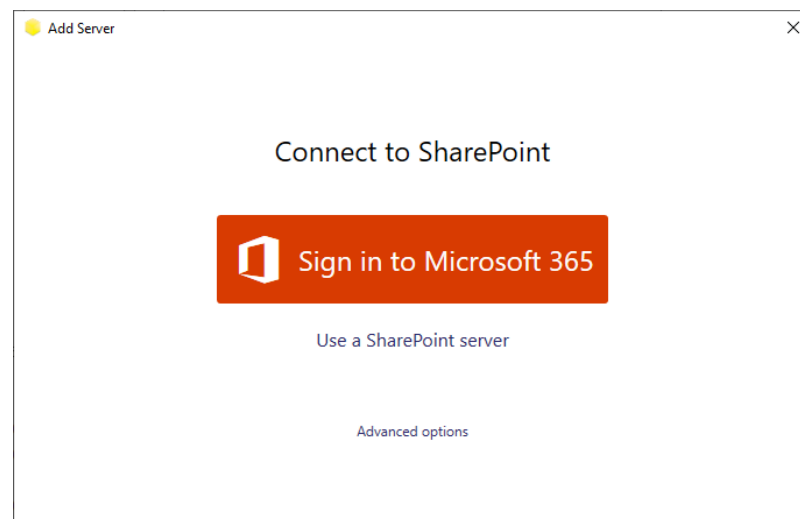


Figure 40: Adding a new server window

To add a server the old way is to select the Advanced options

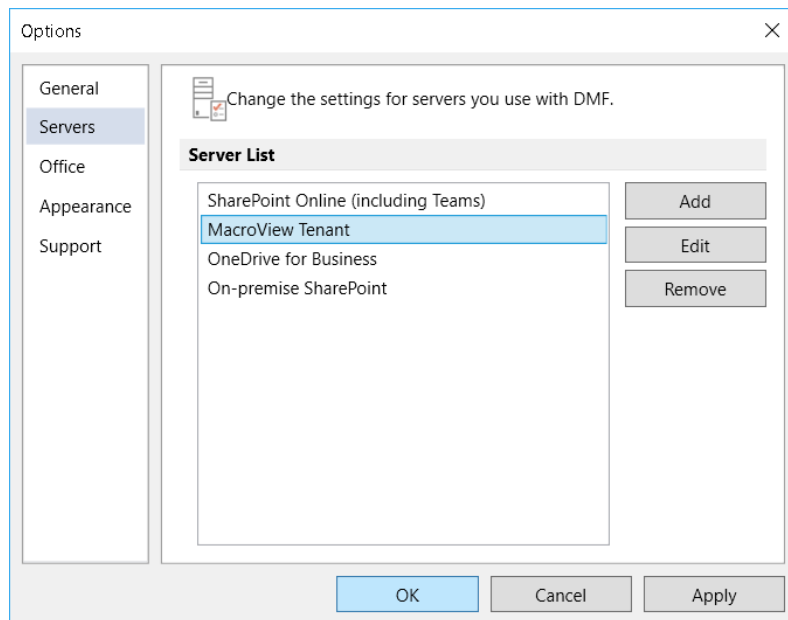


Figure 41: MacroView DMF ribbon tab *File*, *Options*, *Servers* tab

From this screen you can add, edit or remove servers as required.

The servers (web applications by definition and with Office 365 they are site collections) in this list are displayed in the *MacroView DMF* tree-view screens.

Figure 42 below shows the *MacroView DMF* tree-view (non-expanded) that would result from the above entries.

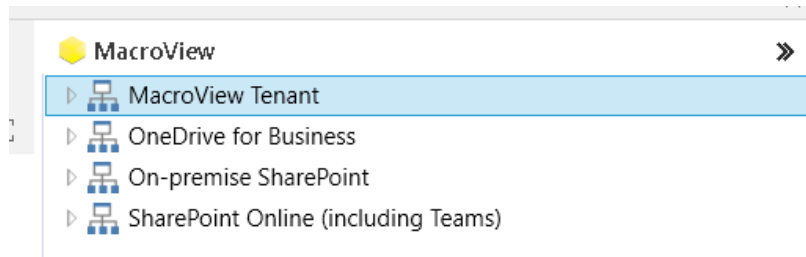


Figure 42: *MacroView DMF* tree-view of a SharePoint environment with four servers

Figure 43 below shows the Add Server screen. In the Server dialog enter a Server Name and the Server Path then select the Server Type.

Note that you must select the applicable Server Type in order to support the appropriate range of functionality on that server:

- SharePoint Server
- SharePoint Foundation
- SharePoint Online (Office 365)¹⁰
- Client Side Only¹¹

If you have entered the URL to a SharePoint Online tenant, the Server Type should be set automatically.

For information on configuring a server in *MacroView DMF* or *Message* refer to this article on the *MacroView Help Centre* -

<https://support.macroview.com.au/hc/en-us/articles/360001307535-Configuring-a-server-in-MacroView-DMF-or-Message>

¹⁰ Access to Office 365 / SharePoint Online servers require that your *MacroView DMF*, *MacroView Message*, *MacroView DMF 365* or *MacroView Message 365* license is activated via the *MacroView Licensing Website*.

¹¹ Use of the *Client Side Only* server type requires registration and activation of the on-premises server via the *MacroView Licensing Website*.

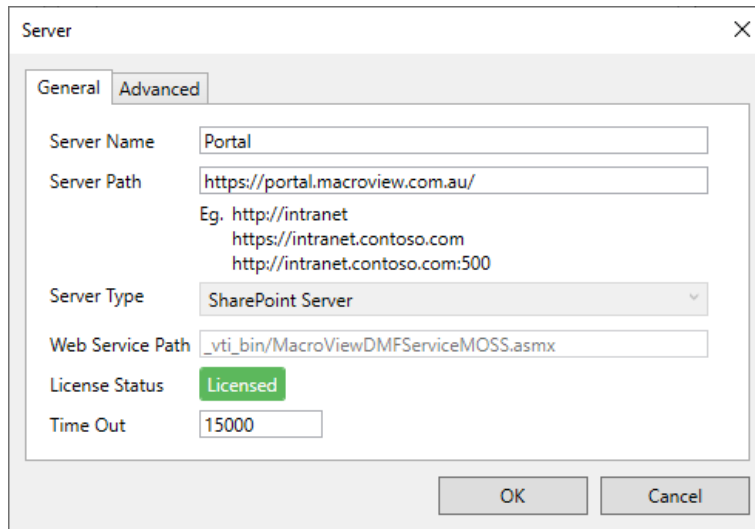


Figure 43: Add Server dialog

SharePoint Online (Office 365) servers also show the name of the current signed in user account in the top right corner of the server dialog.

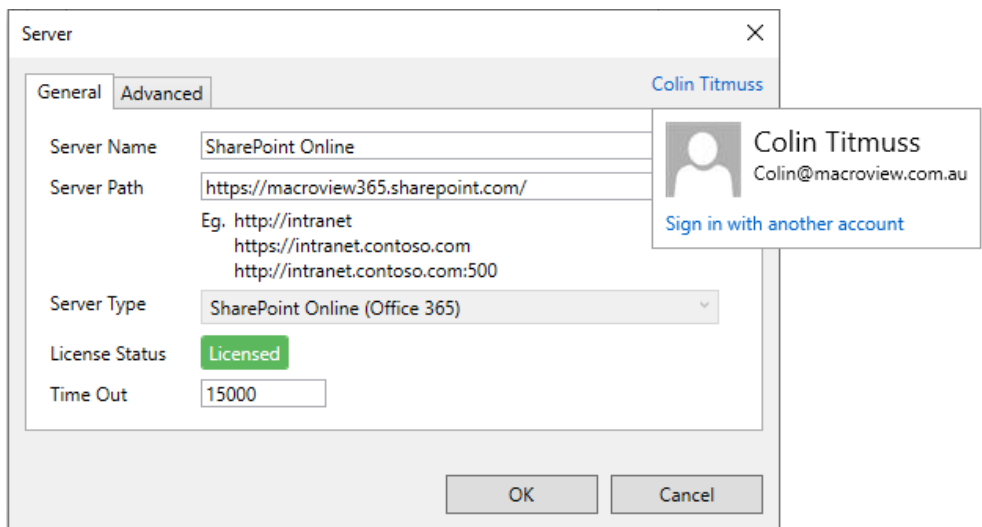
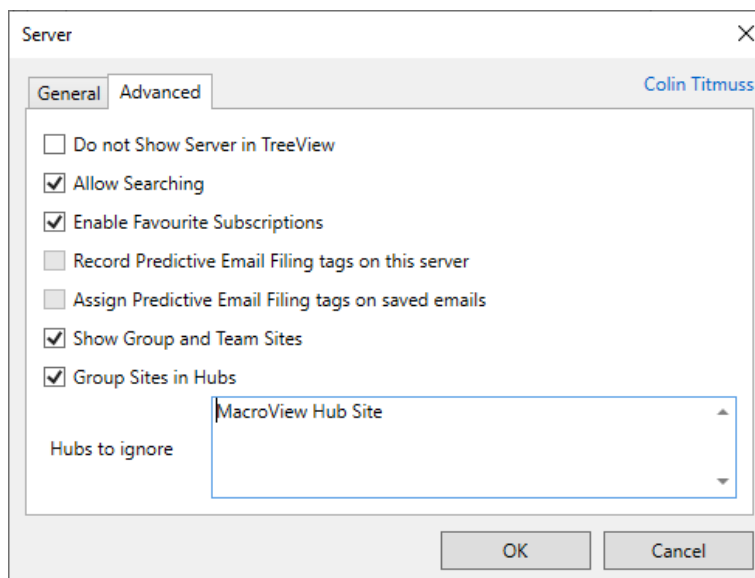


Figure 44: Add Server dialog for a SharePoint Online (Office 365) server

10.5.1

Advance Tab

Additional options for each server are located on the *Advanced* tab.



The following sections provide more information on each of these settings.

- 10.5.2 **Do not Show Server in TreeView**
- Check the *Do not Show Server in TreeView* option if you want to define a server to [MacroView DMF](#) without it appearing in the tree view (which you may want to do if, for example, you want to search the server but not browse it).
- 10.5.3 **Allow Searching**
- If this option is not enabled for a particular server then that server will not be available to choose from the Search Server drop-down list.
- 10.5.4 **Enable Favourite Subscriptions**
- This should only be enabled if you have licensed the Push Favourites extension. If enabled DMF will show pushed favourites defined for this server in favourites mode
- 10.5.5 **Record Predictive Email Filing tags on this server**
- This should only be enabled if you have the [MacroView Predictive Email Filing \(PEF\)](#) which is an optional module for [MacroView Message](#) and [MacroView DMF™](#). [MacroView PEF](#) is designed to assist in significantly reducing the effort associated with email filing.
- 10.5.6 **Assign Predictive Email Filing tags on saved emails**
- This should only be enabled if you have the [MacroView Predictive Email Filing \(PEF\)](#) which is an optional module for [MacroView Message](#) and [MacroView DMF™](#). [MacroView PEF](#) is designed to assist in significantly reducing the effort associated with email filing.
- 10.5.7 **Show Group and Team Sites**
- Team sites will not be visible in the MacroView tree-view if this option is not enabled.
- 10.5.8 **Group Sites in Hubs**
- Site collections that are associated with a hub site will be grouped by the hub sites in the tree view.
- 10.5.9 **Hubs to ignore**
- When *Group Sites in Hubs* is enabled hub sites with a title or GIUID matching values entered in this setting will not be displayed in the tree view.
- 10.5.10 **Registry Keys Relating to *Options* – Servers**
- The relevant registry keys can be managed through Group Policy settings and are located in HKCU\Software\ MacroView\DMF\Servers.
- These keys relate to each Server you define. Each server has a hive under the node above with the name of the hive being the *Server Name* you define on the dialog.
- For details about the relevant registry key configuration settings refer to the Servers tab in the Excel Spreadsheet, [MacroView DMF ADMX](#), provided with the ADMX file on the [MacroView DMF](#) download site.

10.6 Showing and Hiding right click menu items

Individual items in the context sensitive right click menus that appear when you right-click on an item in the Tree View, or an item in the File List, can be shown or hidden as desired.

This is achieved using registry keys which can be managed through Group Policy or on an individual basis. If you set up a key beneath

HKCU\Software\MacroView\DMF\DisabledFunctionality

you can control which items appear by setting any of the following as a DWord to 0 (show) or 1 (hide).

For details about the relevant registry key configuration settings refer to the Disabled tab in the Excel Spreadsheet, MacroView DMF ADM, provided with the ADMX file on the MacroView DMF download site.

10.6.1 Adding third party customizations to the right click menu

In addition to controlling whether menu items appear or are hidden as described above, third party customizations can also be added to the right click menus.

For example:

- launching a SharePoint workflow for a document or document set from the right click menu,
- selecting several documents and publishing them

The process uses the MacroView DMF API and allows the custom assemblies to integrate directly with the core MacroView DMF installation. Contact MacroView Professional Services (solutions@macroview365.com) to discuss your requirements.

10.7 Extensions

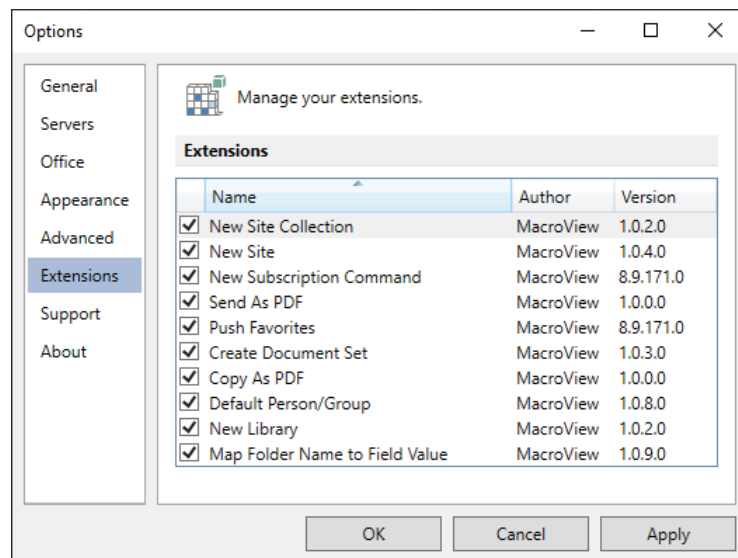


Figure 45: Extensions installed

All available extensions are listed on tab. This may include extensions that are installed by default with MacroView DMF or Message as well as standard and add-on extensions that have been installed separately.

[Click here for more information about Extensions](#)

10.8 About

From version 8.9.173 and later a About tab displays the client version number company details.

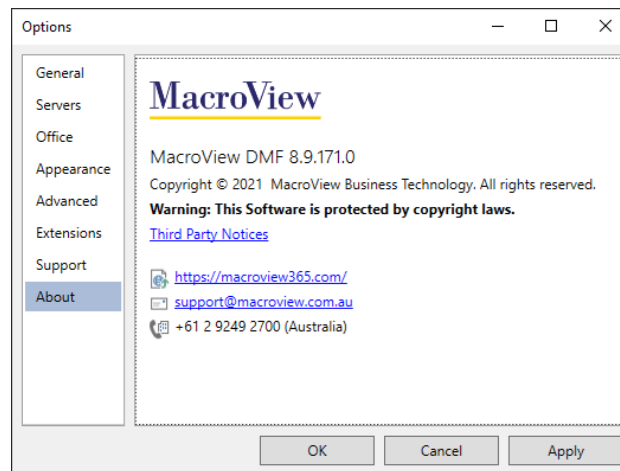


Figure 46:About tab

10.9 Other Registry Keys

Registry keys are used for a range of settings. Some are updatable through the “Options” dialog in the application, some are installed by the application, and some are only ever added manually for specific purposes. If you need a feature in the list below and it isn’t present, add it manually.

10.9.1 User session settings

These are used to *remember* settings from a user’s session so that the next session will start where they left off. They should not be locked down by group policy.

Key	Description
LastMode	Stores the DMF mode that was last set (Browse, Search, Recent, Favorites) so that the next time the main window appears the mode will be the same. Note, the value <i>SharePoint</i> appears instead of <i>Browse</i> .
OutlookView	The name of the most recently used view in Outlook.
PreviewPaneMode	0 – Off ; 1 – On Preview pane mode: Used to store whether the DMF preview pane is currently on or off so that this is persisted across applications/sessions.
WindowMaxed	0 – Off ; 1 – On Specifies whether the DMF window is maximised.
DefaultDialogHeight	Specifies the current DMF dialog height.
DefaultDialogWidth	Specifies the current DMF dialog width.

Key	Description
DefaultWindowHeight	Specifies the current DMF window height.
DefaultWindowWidth	Specifies the current DMF window width.
DialogMaxed	Specifies whether the DMF dialog is maximised.

11. Removing MacroView DMF Software

11.1 Removing DMF Server Components

11.1.1 Retract MacroView DMF Solution

Running the following command on a SharePoint server located in a SharePoint Server Farm will deactivate the [MacroView DMF Solution](#) on all Web Front End servers in that Farm:

```
stsadm -o retractsolution -name "MacroView DMF.wsp" -immediate
```

or

```
stsadm -o retractsolution -name "DMF.wsp" -immediate
```

11.1.2 Delete MacroView DMF Solution

Running the following command on a SharePoint server located in a SharePoint Server Farm will remove the [MacroView DMF Solution](#) from all Web Front End servers in that Farm:

```
stsadm -o deletesolution -name "MacroView DMF.wsp" -override
```

or

```
stsadm -o deletesolution -name "DMF.wsp" -override
```

11.2 Removing MacroView DMF Client

11.2.1 Windows 8.1 / Windows 10 Anniversary Update or higher

- Click Windows Start, Control Panel, Programs and Features

- Click on [MacroView DMF .NET Client, Uninstall.](#)

- Remove Registry Entries from branch:

- Delete the 'Servers' branch from:

```
HKEY_LOCAL_MACHINE/Software/MacroView/WISDOM/Servers
```

or

```
HKEY_LOCAL_MACHINE/Software/MacroView/DMF/Servers
```

- Delete the 'DMF' branch from:

```
HKEY_CURRENT_USER/Software/MacroView/WISDOM/DMF
```

or

```
HKEY_CURRENT_USER/Software/MacroView/DMF
```

12. Troubleshooting

In addition to the common problems described in sections 3.9 (server installation), 7.9 (client installation), 8.1.7 (client upgrade), the following may be of use. In addition there more information on the [MacroView Help Centre](#)

12.1 Problems accessing SharePoint with DMF following installation

Following the installation of the DMF Server components, if you are unable to access your SharePoint environment from the [MacroView DMF Client](#), navigate to the following URLs **on the server** using Internet Explorer:

Microsoft SharePoint Server 2013, 2016 and 2019:

- [http://SERVERNAME\[:PORT\]/_vti_bin/MacroViewDMFServiceMOSS.asmx](http://SERVERNAME[:PORT]/_vti_bin/MacroViewDMFServiceMOSS.asmx)

If you do not see a page similar to the below review the installation steps. If you do see a page similar to the below, contact MacroView.

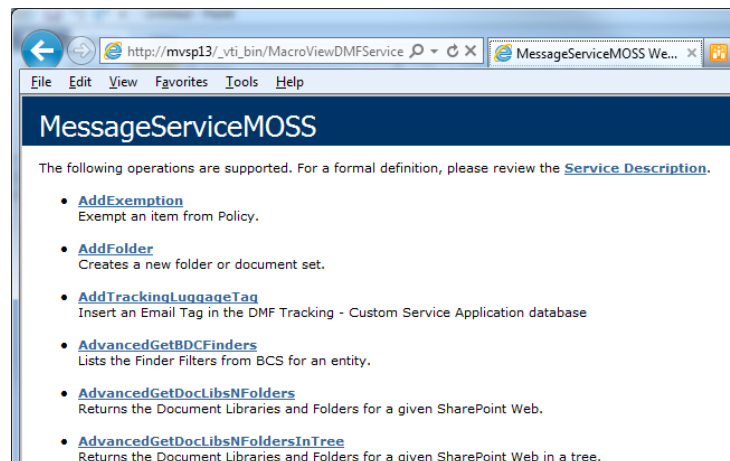


Figure 47: Page displayed by MacroView DMF web service

12.2 'Refresh or F5 to Retry' message is received

- One cause of this problem is an incorrect 'Server Type' setting in the client configuration. To modify this setting access the [MacroView DMF Settings](#) page and select 'Servers' from the left panel menu. Select the server exhibiting the problem and click 'Edit'. Check that the 'Server Type' setting is correct.

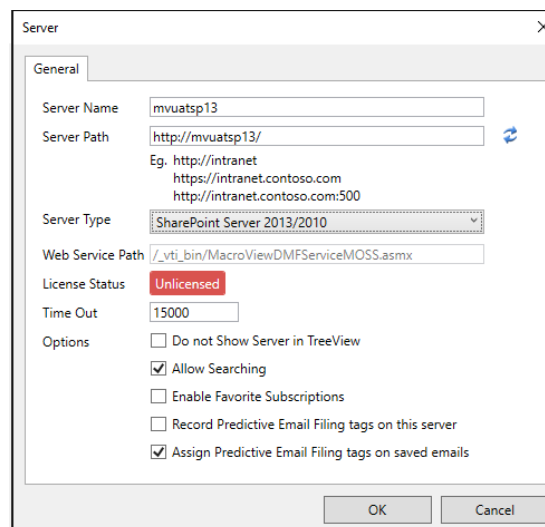


Figure 48: Server settings

- Another cause is an invalid entry for the 'Server Path' setting in the client configuration. The Server Path entered must be a valid URL including the

port address if it is not standard, for example
`http://sharepoint.acme.com.au:81`

- Allow Anonymous access **must NOT be enabled** on the web application being used by the MacroView client to access the SharePoint farm.

