

MacroView Unique Document Numbering and Advanced Office Integration

Version 7

Administration Guide

July 2023

MacroView Business Technology Pty Limited

ACN 081 117 777

ABN 29 081 117 777

Suite 1, Level 24, 31 Market Street Sydney NSW 2000 Australia

GPO Box 5149 Sydney NSW 2001 Australia

T +61 2 9249 2700

E services@macroview.com.au

www.macroview365.com

Microsoft Partner since 2000

Purpose of this document

	This document describes the functionality and intended usage of the MacroView product MacroView Unique Document Numbering (MacroView UDN) and MacroView Advanced Office Integration (MacroView AOI).
Legal Notice	
	MacroView UDN, MacroView AOI and their components are produced and licensed by MacroView Business Technology Pty Limited (MacroView).
	This manual contains material that is copyright to MacroView. It should not be copied or otherwise reproduced without express permission from MacroView.
Disclaimer	
	Every precaution has been taken in the preparation of this documentation. However, MacroView assumes no responsibility for errors or omissions or for damages resulting from the use of the information contained herein.
Trademarks	
	MacroView and MacroView DMF are trademarks of MacroView Business Technology Pty Limited.
	Microsoft, Microsoft PowerPoint, Microsoft Word, Microsoft Excel and Microsoft SharePoint, Microsoft Office and their logos are trademarks of Microsoft Corporation.
Copyright	
	Copyright © 2004-2023 MacroView Business Technology. All rights reserved.

Contents

1.	Intro	duction		1
2.	Tech	nical Req	uirements	2
	2.1	Worksta	tions	2
	2.2	Servers.		2
3.	Macr	oView UD	N Installation Overview	3
-	3.1	Using th	e standard Microsoft SharePoint Document ID Service	3
		3.1.1	Configuration using the standard Microsoft SharePoint Document ID Service	3
	3.2	SharePo	pint On-Premises using the MacroView UDN Document ID Provider	5
4.	Macr	oView UD	N Server	6
	4.1	Summar	٧	6
	4.2	Deploy t	he solution	6
	4.3	Activate	the MacroView Unique Document Numbering Licence	6
	4.4	Create t	he service application	6
		4.4.1	Check the service	6
		4.4.2	When the Service is not running	6
		4.4.3	Configure the service application	9 9
		4.4.5	Upgrading from earlier versions of MacroView UDN	9
	4.5	Creating	a numbering scheme	.10
		4.5.1	Numbering Format	.11
		4.5.2	Reference Format	.11
		4.5.3 4 5 4	Reference Format in other languages	.12
	46	Activate	the Site Collection features	13
	4.7	Choose	a numbering scheme for a Site Collection	.14
	4.8	Choose	the numbering scheme for a document library	.15
	4.9	Displayi	ng the Document ID as a column in MacroView DMF or a SharePoint View	.15
	4.10	Upload a	a document into SharePoint	.16
5.	Macr	oView UD	N Client	.17
		5.1.1	MacroView UDN Client Installation	.17
		5.1.2	MacroView UDN Client Settings	.18
		5.1.3	Additional General Settings for Word/Excel	.19
		5.1.4 5.1.5	Insert Document ID Ribbon Button	.19
		5.1.6	Configuring the footer Reference position	.19
		5.1.7	Configuring the Document ID format in Microsoft Word and Excel at the client sid	le
			20	~ .
		5.1.8	Display information in the Application Window Caption	.21
		5.1.10	Discard All Changes Button	.21
		5.1.11	Saving a new document	.23
	5.2	Advance	ed Office Integration (AOI) Functionality	.23
		5.2.1	MacroView AOI Overview	.23
		5.2.2	MacroView AOI Prerequisites	.23
		5.2.5 5.2.4	Save Options for different library version settings	.23
		5.2.5	Overwrite Existing Version	.26
		5.2.6	Save As New Document	. 27
		5.2.7	Discarding Changes	.27
		5.2.8 5.2.0	Discard All Changes Button	.27
		5.2.10	Disable overwriting versions saved by another user	.28
		5.2.11	Close Document When Restoring Edit State	.28
		5.2.12	Saving a document that has not been checked out	.28
		5.2.13	Enable AOI In All Libraries	.29
6.	Getti	ng Help		.31

6.1	What V	Version?	
	6.1.1	MacroView UDN Server	
	6.1.2	MacroView UDN Client	
6.2	Log Fil	les	
	6.2.1	MacroView UDN Client and AOI Client	
Insta	lled Serv	ver Components	
Rem	oving Ma	acroView Unique Document Numbering Software	
8.1	Retrac	t the solution	
8.2	Delete	the solution	
Appe	ndix		
9.1	Load B	Balancing	
9.2	Upgrad	ding from version 5.1.X	
	 6.1 6.2 Insta Rem 8.1 8.2 Appe 9.1 9.2 	 6.1 What 3 6.1.1 6.1.2 6.2 Log Fit 6.2.1 Installed Ser Removing M 8.1 Retract 8.2 Delete Appendix 9.1 Load F 9.2 Upgration 	 6.1 What Version?

1. Introduction

Microsoft SharePoint® provides a range of functionality for storing and managing documents, emails and other files. MacroView Document Management Framework (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 UDN is a companion product to MacroView DMF which assigns a unique Document ID to documents that are saved or uploaded to SharePoint and enables the automatic insertion of a document reference into Word and PowerPoint documents.

The MacroView UDN Document ID Provider is available for on-premises SharePoint environments and can be configured to automatically assign the next available unique Document ID across the document libraries in a specific Site Collection or across all Site Collections in the SharePoint environment. The format of the Document ID provided by the MacroView UDN Document ID Provider is also configurable.

In a SharePoint Online (Office 365) or Client Side Only environment, MacroView UDN makes use of the standard Microsoft SharePoint Document ID Provider.

MacroView AOI provides enhanced functionality to MacroView UDN when saving Word and Excel documents to SharePoint. Compared to the standard Word / SharePoint experience when closing and saving a document, it:

- Provides users with more granular control over version creation; and
- Minimizes the prompting to end users

MacroView UDN and MacroView AOI are the result of MacroView's extensive experience with the development of custom document automation and document management solutions for leading banks, law firms and many other organizations, both within Australia and around the world. This is combined with leading technical skills in Microsoft Office and Microsoft SharePoint.

2. Technical Requirements

2.1 Workstations

MacroView UDN Client 7 and MacroView AOI Client 7 can run on workstations with:

- Microsoft Windows 10(64 bit recommended)/ Windows 11
- Microsoft Office 2016, 2019 or, Office 365 (x86 or x64)
- NET Programmability for Microsoft Office (aka PIAs)
- Microsoft .NET Framework v4.8
- Visual Studio Tools for Office (VSTO) 4.0 Runtime
- MacroView DMF Client Version 9 or later.

Note: MacroView UDN Client does not need to be installed if you are installing MacroView AOI as the UDN client functionality is incorporated into the AOI client for ease of deployment.

2.2 Servers

Note: MacroView UDN Server is not required when using UDN in Client Side Only Mode or with SharePoint Online.

MacroView UDN Server 6.0.2 can run on servers with the following supported versions of SharePoint:

- Microsoft SharePoint Server 2016
- Microsoft SharePoint Server 2019

3. MacroView UDN Installation Overview

3.1 Using the standard Microsoft SharePoint Document ID Service

MacroView UDN Server is not required when using the standard Microsoft SharePoint Document ID Service.

Using MacroView UDN in a SharePoint Online (O365), Client-Side Only or SharePoint On-Premises environment, the standard Microsoft SharePoint Document ID Service needs to be activated.

Follow the instructions in Section 3.1.1 below and then install the MacroView UDN client (refer section 5).

3.1.1 Configuration using the standard Microsoft SharePoint Document ID Service

Within the site collection you intend to use UDN/AOI client, ensure that the "Document ID service" is activated.

This can be done by navigating to the Site Settings-> Site Collection Administration-> Document -> Site Collection Features and then activating the Document ID service.

Site Settings

Users and Permissions People and groups Site permissions Access requests and invitations Site collection administrators Site app permissions

Web Designer Galleries Site columns Site content types Web parts List templates Master pages Themes Solutions Composed looks

Site Administration Regional settings Language settings Site libraries and lists User alerts RSS Look and Feel Title, description, and logo Quick launch Top link bar Navigation Elements Change the look

Site Actions Manage site features Enable search configuration export Reset to site definition

Site Collection Administration Recycle bin Search Result Sources Search Result Types Search Query Rules Search Settings Search Settings Search Configuration Import Search Configuration Export Site collection features

Document ID Service

independent of their current location.

Assigns IDs to documents in the Site Collection, which can be used to retrieve items

Deactivate Active

Microsoft numbering should be enabled and the prefix configured.

The prefix can be configured at Site Settings->Site Collection Administration-> Document ID settings.

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 Site collection audit settings Audit log reports Portal site connection Content Type Policy Templates Storage Metrics Site collection app permissions Record declaration settings Site Policies Content type publishing Popularity and Search Reports Document ID settings HIML FIELD SECURITY SharePoint Designer Settings Site collection health checks Site collection upgrade

Document ID Settings

Assign Document IDs

Specify whether IDs will be automatically assigned to all documents in the Site Collection. Additionally, you can specify a set of 4-12 characters that will be used at the beginning of all IDs assigned for documents in this Site Collection, to help ensure that items in different Site Collections will never get the same ID. Note: A timer job will be scheduled to assign IDs to documents already in the Site Collection.

Begin IDs with the following characters:	
DEMO	
Reset all Document IDs in this Site Collection characters.	to begin with these

Document ID Lookup Search Scope Specify which search scope will be used to look up documents using their IDs.

Use this search scope for ID lookup: All Sites 🗸

Assign Document IDs

You can confirm the format of the document Id number by adding the Document ID to one of the library views.

123 Collins Street > 1_Investment Acquistion > Contract and Agreement								
$\square \blacksquare \lor $	Name \checkmark	Document ID \smallsetminus	Version \smallsetminus					
	MacroView DMF Tips and Tricks.docx	DEMO-2027273606-58	1.0					
	MacroView Message Tips and Tricks.docx	DEMO-2027273606-57	1.0					
	Contract to client.docx	DEMO-2027273606-55	1.0					

122 Colline Street > 1 l . . ictic $\sim -$ 1.4

፼ ຽ·ଓ ÷	DEM	10-2027273606-6	7∖1.0 - Thursday test	document.docx -	Word I		o x
File Home Insert	Design	Layout Refer	ences Mailings	Review Viev	v 🛛 Tell me	Dennis Lo	A Share
Open from SharePoint Save As to SharePoint	Paste	Font v	h Insert Discard Reference Chang	Options All Jes	Styles Editing		
MacroView	Clipboard 🗔		UD	N			~
Thursday test docun 2 May 2019 South Haven Group	nent						
V2							
Page 1 of 1 10 words	English (Au	ustralia)			-		-+ 110%

Figure 1 Document ID displayed when using UDN

3.2 SharePoint On-Premises using the MacroView UDN Document ID Provider

MacroView UDN Server is required when using the MacroView UDN Document ID Provider in a SharePoint On-premises environment. You need to follow the instructions from Section 4 below and then install the MacroView UDN client (refer section 5)

Ensure that you are a SharePoint Farm Administrator with rights sufficient to deploy solutions.

Upgrade instructions are available on the download site.

4. MacroView UDN Server

4.1 Summary

- 1. Deploy the solution.
- 2. Activate the licence on your server farm.
- 3. Configure Unique Document Numbering.
- 4. Activate the site collection features.

4.2 Deploy the solution

Copy the 'macroview unique document numbering.wsp' file to the c:\temp folder on the SharePoint server.

Open the SharePoint Management Shell and execute the following command:

Add-SPSolution -LiteralPath "c:\temp\macroview unique document numbering.wsp"

Launch the SharePoint Central Administration Console

Select the 'System Settings' and under Farm Management select 'Manage Farm Solutions'.

Within the 'Solution Management' page select 'macroview unique document numbering.wsp' and deploy the solution.

4.3 Activate the MacroView Unique Document Numbering Licence

Refer to section 3.5 of the *MacroView DMF Install and Configuration Guide*. Select the 'Unique Document Numbering' product when prompted.

4.4 Create the service application

4.4.1 Check the service

Navigate to the 'Services on Server' page and confirm the 'MacroView UDN Service' has started. If the service has not restarted refer to section 3.4.2.

Services on Server ×					
SharePoint	Sites		¢	?	System Accoun
					🗘 SHARE
Monitoring			•	10	
Backup and Restore	Access Services	stopped	Ø	Yes	
Security	App Management Service	Started	\oslash	Yes	Restart
Upgrade and Migration	Business Data Connectivity Service	Started	\oslash	Yes	Restart
General Application	Central Administration	Started			Stop
Settings	Claims to Windows Token Service	Started	\oslash	Yes	Restart
Apps	Distributed Cache	Started	\checkmark	Yes	Restart
Office 365	Document Conversions Launcher Service	Stopped	\bigcirc	Yes	
Configuration Wizards	Document Conversions Load Balancer Service	Stopped	\checkmark	Yes	
	Lotus Notes Connector	Stopped	\oslash	Yes	
	Machine Translation Service	Stopped	\checkmark	Yes	
	MacroView DMF Predictive Email Filing Service	Started	\oslash	Yes	Restart
	MacroView UDN Service	Started	\oslash	Yes	Restart
	Managed Metadata Web Service	Started	\oslash	Yes	Restart
	Microsoft SharePoint Foundation Incoming E-Mail	Started	\oslash	Yes	Restart

Figure 2 MacroView UDN Service

4.4.2 When the Service is not running

Use the below steps:

Restart the SharePoint Timer Service



Figure 3 SharePoint Timer Service

- Restart IIS with *iisreset*.
- Confirm the service is running
- If above does not restart the service, an alternative method would be to Use the below PowerShell command:

Get-SPServiceInstance

Administrator:	SharePoint	: 2016 Management Shell 📃 🗖 📑	×						
PS C:\Users\sp_install> Get-SPSe	PS C:\Users\sp_install> Get-SPServiceInstance								
ТуреName	Status	Id	≡						
Search Host Controller Service Microsoft SharePoint Insights App Management Service Managed Metadata Web Service Musiness Data Connectivity Se Request Management Secure Store Service Claims to Windows Token Service Microsoft SharePoint Foundati PerformancePoint Service Ticrosoft SharePoint Foundati Usis Graphics Service SharePoint Server Search Document Conversions Launcher Document Conversions Load Bal Document Conversions Load Bal Search Query and Site Setting Catorsof Aminicher Foundati Contral Adminicher Foundati User Profile Service	Online Disabled Online Disabled Online Disabled Online Disabled Disabled Disabled Disabled Online Disabled Online Online Online Online Online	$\begin{array}{l} 4756hfa8-9h25-4hc9-9947-36408108666311\\ 2h3a27e1-c3ec-4cc9-96ff-922f308e408f\\ 3439h2h-187f-4c6c-a49a-73262df3alfaafaac666311\\ c349h2h2h-223h-40h0-9h8f-41108c5981d7a\\ abbcch1b-624f-4be7-9205-h246a5cc4ee\\ c7c37b8c-abbf-41b2-h78f-6abf24db85a57\\ b914h3e1-2abd-4be7-9205-h246a5bcc4ee\\ c7c37b8c-abbf-41b2-h78f-6abf24db85a57\\ b914h3e1-2abd-4c7d-9h8f-4113e994028f\\ 8123ef60-eecc-4832-b82a-a34e4h98431f3267\\ 2c294a5c-d3e8-455-854d-4eb9431f3125464b\\ 3b5cec2f-d3e8-455-854d-4eb94316155464b\\ 3b5cec2f-d3e8-455-854d-4eb94316155464b\\ 3b5cec2f-d3e8-4552-854d-4eb94316155464b\\ b83c6940-462-4b7-2ab14-e784185546666b\\ b83c6971-d426-4b7-2ab14-e78418546146b\\ b83c6971-d426-4e72-866b-b141636114660\\ 4c142f21-d637-4f74-491bf-202638f135564b\\ c3286770-fe35-438e-a701-88b44baba7a\\ c438bf256-6187-439e-a6f2-2f344bc564b\\ c79eb558-a511-4f15-6428-4c28335c-a48b\\ 79eb558-a511-4f75-aab8-fc58978e6916 \end{array}$	~						

Find the UDN service and its Identity

Select Administrator: S	harePoint 2016 Management Shell 📃 🗖 🗙
<pre>icrosoft SharePoint Foundati On1 Central Administration Nicrosoft SharePoint Foundati On1 User Profile Service Project Server Application Se Dis Microsoft SharePoint Foundati Dis Lotus Notes Connector Nord Automation Services Nord Automation Service Nacroliew UNN Service Distributed Cache PS C:\Users\sp_install> _</pre>	ine 468bf926-1817-43ec-8030-2e722845befe 21da8409-51F7-499c-aff2-ef3140755-48 ine 79e9b558-a511-4fb5-b4f2-2c20533cae40 ibf04a06c-b031-4776-aa3a-f7f273aac633 shled cc03013209-2722-4581-b580-9696196 shled c03513209-2722-4581-b580-99690195196 shled c035728c-a564-4953-819a-95b553417c3 shled 7993a-c722-4185-9664-395-966b0974935 shled 7945978ac-c329-4185-9646-584991828cb3 shled 3556bc1a1-09fdF-464a-9264-8b5746858cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b4327188cb3 shled 487c87a4-24c1-4bc6-b455-b432788cb3 shled 487c87a4-24c1-4bc6-b455-b432788cb3 shled 487c87a4-24c1-4bc6-b455-b432788cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 487c87a4-24c1-4bc6-b455-b432728cb3 shled 567b12f97-27ea-4f24-b156-978ca3c88b789

Use the below PowerShell command Start-SPServiceInstance [-Identity]



Confirm the service is running

S C:\Users\sp_install> Get=SPServiceInstance ypeName Id I Garch Host Controller Service Init Init States Init Init Init Init Init Init Init Init	acroView UDN Service	Provi	556bc1a1-0fdf-4e4a-9264-8b57d605ae93
ypeName Status Id earch Host Controller Service icrosoft SharePoint Insights pp Management Service anaged Metadata Web Service ccess Services usiness Data Connectivity Se elams to Windows Token Service discount SharePoint Poundati bisabled bisbled bisbleb bisbleb bisbled bisbled bisbleb bisbled bisbled bisbleb bis	\$ C:\Users\sp_install> Get-\$P\$e:	rviceInst	ance
earch Host Controller Service on line $47566 Fa8 - 9h25 - 4hc9 - 9947 - 36d01696631$ icrosoft SharePoint Insights on line $3430 h25 - 4hc9 - 9947 - 36d01696631$ jtsahled 2B3a2721-c3ec-4c9 - 96ff - 922f3960e448f on line $3430 h215 - 1317 - 46c - 346a - 7322d13 a1faa$ on line $3430 h215 - 1317 - 46c - 346a - 7322d13 a1faa$ on line $3430 h215 - 1317 - 46c - 346a - 7322d13 a1faa$ bisabled bisber	ypeName	Status	Id
$\begin{array}{llllllllllllllllllllllllllllllllllll$	icrosoft SharePoint Insights pp Management Service anaged Metadata Veb Service ccess Services usiness Data Connectivity Se equest Management ecure Store Service laims to Windows Token Service icrosoft SharePoint Foundati erformancePoint Service icrosoft SharePoint Foundati isio Graphics Service	Disabled Online Disabled Online Disabled Online Online Disabled Disabled Disabled	$\begin{array}{c} 2b3a27e1-c3ec-4cc9-9c6ff-922f300e448f\\ a849b21b-f3f7-4c6c-a48a-7372df3a1faa\\ e8903789-3183-4a6a-9376-3b57b1fb6fdb\\ 6cb91978-223b-44b49-9b4f-4118c5828147a\\ ab8ccb1b-624f-408-79285-b426455cc4ee\\ c7c3768c-a6b4-4182-b70f-6a5420485637\\ b914b361-2abd-4c7-9285-b413e0940828f\\ 8129ef60-ee6c-4032-b82a-a34e4b493fdf\\ e329456-d38e-4352-856d-dcb.9f47229c\\ b5cce2f-d68a-4652-a811-e7841859444\\ 387a9352-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-593f-437b-b25a-ed451b5732a\\ 849cc7a52-593f-437b-b25a-ed451b5723a\\ 849cc7a52-5936-593f-437b-b25a-ed451b5723a\\ 849cc7a52-5936-5936-435b-65566-57632a\\ 849cc7a52-5936-5936-435b-65566-576326\\ 849cc7a52-5936-5936-556-6566-576326\\ 849cc7a52-5936-5936-5566-576500-57622\\ 849cc7a52-5936-5936-5566-5765252\\ 849cc7a52-5936-5936-5566-57657252\\ 849cc7a52-5936-5936-5566-57657232\\ 849cc7a52-5936-5936-5566-57657232\\ 849cc7a52-5936-5936-5936-55666-57657232\\ 849cc7a52-5936-5936-5936-55666-576566-576566-5765666-576566-5765666-5765666-5765666-5765666-5765666-5765666-5765666-5765666-5765666-576666-5765666-5765666-5765666-5765666-5765666-57656666-5765666-576666-5765666-57656666-57666666-5765666-576666-576666-576666-576666-576666-5766-57666-57666-5766-57666-5766-5766-5766-5766-57666-5766-5766-5766-5766-5766-5766-57666-57666-57660-57666-57666-5766-57$
lcrosoft Sharefoint foundati Disabled c83b1368-7272-4501-508d-8976930195196 obts Notes Connector Disabled d55e738c-3564-4953-819a-955534117c3 ord Automation Services Disabled 94c999ae-c929-4105-8085-956534117c3 Disabled 94c999ae-c929-4105-8085-956509094935 Disabled 97041411-c919-4f36-9645-564049183ee5c acroUiew UDN Service Conline 556bc1a1-0fdf-4e4a-9264-955746953e65 acroUiew DHF Predictive Emai Online 036257e5-7fd4-487a-9261-805766978	ocument Conversions Laucher. ocument Conversions Load Bal earch Query and Site Setting icrosoft SharePoint Foundati entral Administration icrosoft SharePoint Foundati ser Profile Service ccess Database Service 2010 froject Server Application Se	Disabled Disabled Online Online Online Online Disabled Disabled	$\begin{array}{c} f03208271-df26-4s73-b02c-5h1453611400\\ dc142f21-6a97-4f64-9fbf-026438f13563\\ dc328ef790-fea5-438c-a781-a8b44babe47e\\ 460bf726-1881-43bc-a781-a8b44babe47e\\ 460bf726-1881-44bc-aff2-cf381-485bc-68\\ 79e9b558-a511-4fb5-b4f2-2c28f533cae40\\ 979e9b558-a511-4fb5-b4f2-2c28f533cae40\\ 978e9b558-a511-4fb5-b4f2-2c28f533cae40\\ 1385300f-b95b-4cdf-aa3a-f78273aac53\\ ccee0109-2f12c-4883-9e5-b61126(dabc8e\\ \end{array}$
listributed Cache Online 5fb12f97-27ea-4f24-b156-978ca3c8b709	icrosoft SharePoint Foundati otus Notes Connector ord Automation Services owerPoint Conversion Service acroUiew UDN Service lacroUiew UDMF Predictive Emai lachine Translation Service istributed Cache	Disabled Disabled Disabled Online Online Disabled Online	C#35h13cB+-2272=450H1=b3dB=047cB47H17c3 94c999ae-c929-4105-8485-966b609b4935 496491H1-c919-4436-964b-58449183ee5c 556bc1a1-0fcf=464a-9264-8b57d605ae93 036257c5-7fd=4972-983f-fd5eb7528cb3 d87c87a4-24c1-4bc6-b455-bd3e72b148c5 fb12f97-27ea-442-4b156-928ca3eb7309

4.4.3 Create a new service application

Navigate to the 'Manage service applications' page and select 'New > MacroView UDN Service Application'.



4.4.4 Configure the service application

Enter the settings for your service application and press OK when finished.

Name Choose a name for the new service application.	Service Application Name	
Use of the default database server and database name is recommended for most cases. Refer to the administrator's guide for advanced scenarios where specifying database information is required. Use of Windows authentication is strongly recommended. To use SQL authentication, specify the credentials which will be used to connect to the database.	Database Server qasp2019 Database Name	
Failover Server You can choose to associate a database with a specific failover server that is used in conjuction	Failover Database Server	

4.4.5 Upgrading from earlier versions of MacroView UDN

Versions of MacroView UDN prior to v5.0 stored numbering scheme information in web application properties. They are now stored in a database table in the service application. When you create the service application, any existing web application property numbering schemes are automatically added to the service application.

You must check that the automated upgrade process correctly migrated your numbering schemes and make any changes as necessary.

4.5 Creating a numbering scheme

Navigate to the 'Manage' page of your newly created service application.

The 'Manage Unique Numbering' page allows you to define one or more unique numbering schemes that associated with the service application.

Select 'New Scheme' to create a numbering scheme or click on the scheme name to edit or delete





5>	Manage Unique N	lumbering ©			
Central Administration	Rew Scheme				
Application Management	Scheme Name	Numbering Format	Reference Format		
System Settings	Documents	mv000	[Document ID Value][Version]		
Monitoring	Documents - Copy	MMM000	[Document ID Value][Version]		
Backup and Restore	Precedents	P000	[Document ID Value]		
Security	Second Documents	mv-000-000	[Version]		
Upgrade and Migration					
General Application Settings	Version: 6.0.2.0				
Apps				OK Cancel	٦
Office 365					-
Configuration Wizards					

Figure 4. Setting up a numbering scheme

When adding a unique numbering scheme you enter the scheme name, numbering format, reference format and set the next number.

Edit Unique Numbering Scher	ne	□ ×
Settings	Scheme Name: Documents Numbering Format: mv000 Reference Format: [Document ID Value][Version] Next number (before Numbering Format is applied): ① Use number from this scheme 349 Use number from another scheme Precedents v	
	OK Can	icel

4.5.1 Numbering Format

This specifies the format of the Document ID assigned to each file.

When defining a Numbering Format, you **must** include a non-numeric character e.g. 'legal\000001', 'admin 000-001' etc.

If you are defining multiple Unique Numbering Schemes, you need to ensure that the Numbering Format in each scheme is unique.

You can also specify the minimum number of digits that will be recorded, with zero padding to the left (e.g. '00000' specified that at least 5 digits will be displayed in the Document ID – '00001', '00002' etc.).

You can also specify additional formatting characters (e.g. '000-000-000', specifies a 9 digit number – '000-000-001', '000-000-002' etc.).

If the number of documents exceeds the number of padding digits, additional digits will be added to the end of the number (e.g. mv 999-999, mv-100-0000, mv-100-0001 etc.).

4.5.2 Reference Format¹

A document reference can be inserted into the footers of your Microsoft Word and Excel files. This reference can be inserted by the 'MacroView UDN Client' add-ins (see section 5) or by using Microsoft Office Custom Document Properties in the Microsoft Office applications.

The value of the document reference is a concatenation of the values of other columns present in the document library, together with special characters and other text. That concatenation is defined in the Reference Format text box.

The display name of each document library column entered in the 'Reference Format' text box must be enclosed within square brackets []. Note that both custom columns and built-in columns can be used. Examples of built-in columns are [Created], [Version] and [Content Type].

There are also a number of reserved keywords that can be used to insert information from properties of the relevant file as listed below.

Key Word	Comment
[Site Collection Name]	Inserts the name of the Site Collection where the file is saved.

¹ When using MacroView UDN in Client Side Only Mode or with SharePoint Online (Office 365) the reference format is set in the HKEY_CURRENT_USER\SOFTWARE\MacroView\Udn registry key on the client computer.

1

Key Word	Comment
[Site Collection URL]	Inserts the URL of the Site Collection where the file is saved.
[Site Name], [Site Title], [Web Name], [Web Title]	Inserts the name of the Site or Web where the file is saved (i.e. the lowest element in the folder hierarchy).
[Site URL], [Web URL]	Inserts the URL of the Site or Web where the file is saved.
[Library Name], [Library Title]	Insert the name of the Document Library where the file is saved.
[Library URL]	Insert the URL of the Document Library where the file is saved.
[Modified:dd MMM yyyy]	Inserts the date on which the document was last modified. The date can be displayed in a large number of formats (any valid .Net 'DateTime' format) (e.g. [Modified: yyyy MMM dd] - 'Modified: 2011 Jan 28', [Modified: dd/MM/yy hh:mm:ss] - 'Modified: 25/12/11 12:41:30').
[Version]	Inserts the version of the document. When a document is opened in an editable state MacroView UDN will insert a suffix after the version number. The default suffix is 'a' (e.g. mv-001/1.0a). The suffix is removed when the document is checked in, (or closed if the document is not in a library with 'Required Check Out' enabled). The suffix may be customised in the Registry. Please contact MacroView for further details.

The following Reference Format specifies a concatenation of the document library title 'Acme Premises Sale' with the unique document numbering column (EUR000-123) with the current Version Number (1.3):

[Library Name] : [Document ID Value] / Version: [Version]

e.g. Acme Premises Sale : EUR000-123 / Version: 1.3

4.5.3 Reference Format in other languages

For farms, site collections or libraries that use other languages the library columns referenced should use the equivalent library display names. For example:

In English

[Library Name] : [Document ID Value] / Version: [Version]

In Dutch

[Library Name] : [Waarde van de document-id] / Versie: [Versie]

In Japanese

[Library Name] : [ドキュメント ID 値] / バージョン: [バージョン]

Note: If multiple languages are used in your Farm then you should design schemes for each language and set them on the relevant site collections or libraries.

4.5.4 Next Number

Enter a number here if you want your numbering system to start at a given number. This is very useful in cases where you are migrating from a previous system, so that numbering in SharePoint can continue from the point that was reached by the previous system.

Alternatively, you can set your numbering scheme to use the number from another scheme. This can be useful if you want two schemes that use the same numbers but format them differently.

4.6 Activate the Site Collection features

Note: Ensure that you are the SharePoint Site Collection Administrator.

Navigate to the Site Collection Features page of your site and activate the 'Document ID Service' and 'MacroView Unique Numbering' features.



Figure 5. Activate the Site Collection features

The Microsoft Document ID Service will add a 'Document ID' column to the Document content type. This may not happen until the 'Document ID enable/disable job' is next run.

You may choose to save the site as a template so that the feature is automatically on when creating new sites.

4.7 Choose a numbering scheme for a Site Collection

Navigate to the site settings page in your site collection and select 'Unique Numbering Scheme'.

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 Storage Metrics Site collection app permissions Site Policies Content type publishing Popularity and Search Reports Site collection object cache Variations Settings Variation labels Variation logs Suggested Content Browser Locations Unique Numbering Scheme Document ID settings

Figure 6. Choose the numbering scheme for a Site Collection

Select the numbering scheme you wish to use from those that you defined in section 4.4. This numbering scheme applies to all document libraries in this site collection unless a specific numbering scheme has been selected for a document library.

Home Test Multiple Permissions MacroView Unique Documen	nt Numbering Scheme 🛛	Searc
Unique Numbering Scheme Specify the Unique Document Numbering Scheme to use for this site collection.	Scheme: Documents	
	ОК	Cancel

Figure 7. Choose the numbering scheme for a Site Collection

4.8 Choose the numbering scheme for a document library

By default, a document library will inherit the numbering scheme from its parent site collection. You can select a different numbering scheme by navigating to 'Library Settings > Unique Numbering Scheme' and selecting a numbering scheme from the dropdown menu.

s >	Home Test Multiple Permissions MacroView Unique Document Numbering S	Search this site \mathcal{P}
Libraries Lists Recent Emails Dennis Emails Documents Tasks	Unique Numbering Scheme Specify the Unique Document Numbering Scheme to use for this library.	Scheme: Inherit from Site Collection Documents Documents - Copy MV19 Precedents Second Documents OK Cancel

Figure 8. Choose the numbering scheme for a document library

Changing the Numbering Scheme will mean that any documents subsequently added to that Document Library will be assigned the next available number associated with the new Numbering Scheme.

4.9 Displaying the Document ID as a column in MacroView DMF or a SharePoint View

A Document ID column may be added to the view of a Document Library by modifying the view and selecting the checkbox to display 'Document ID (linked to document)' column.

Display	Column Name	Position from Left
\checkmark	Type (icon linked to document)	1 🖌
\checkmark	Document ID (linked to document)	2 🗸
\checkmark	Name (linked to document with edit menu)	3 🗸
\checkmark	Modified	4 💙
\checkmark	Modified By	5 🖌
	Display V V V V V	Display Column Name Image: Column Value Type (icon linked to document) Image: Column Value Document ID (linked to document) Image: Column Value Name (linked to document with edit menu) Image: Column Value Modified Image: Column Value Modified Image: Column Value Modified

Figure 9. Display Document ID Column

This will also add a column displaying the Document ID in DMF Explorer.

D	Document ID	Name		Modified	Modified By
P	mv001	Shoosmiths email customsation X	•••	A few seconds ago	Dennis Louie

Figure 10. Display Document ID Column

4.10 Upload a document into SharePoint

Verify that you have installed MacroView Unique Document Numbering by uploading a document in your SharePoint document library.

Open the Properties page for your document, and note that your document has a Document ID.

SharePoint :		
BROWSE VIEW		
Edit Item Manage	Alert Me Alert Me Manage Copies Workflows Actions	
Libraries Lists	Name Title	Shoosmiths email customsation.docx Shoosmiths email customsation.docx
Recent Emails Dennis	Document ID Currency dutcl	mv001
Documents	Currency US Currency UK	
Standard columns Currency	Currency Yen Currency Chin	a

Figure 11. MacroView UDN document properties

5. MacroView UDN Client

MacroView UDN supports the automatic insert and update of Document IDs in Microsoft Word and Excel through the use of Office Add-Ins. In order to take advantage of this functionality you must install the either the MacroView UDN Client **or** the MacroView AOI client.

Note: MacroView UDN Client does not need to be installed if you are installing MacroView AOI as the UDN client functionality is incorporated into the AOI client for ease of deployment.

5.1.1 MacroView UDN Client Installation

Download and run the UDN client installer that matches your computers version of Windows:

macroview.udn.client.x64.msi for 64-bit Windows or;

macroview.udn.client.x86.msi for 32-bit Windows

This will install Office Add-ins for Word and Excel. Documents will also have the *Reference* field automatically inserted as they are opened from SharePoint.



Figure 12. MacroView UDN Client Installation wizard



Figure 13. MacroView UDN Client Installation wizard

1	MacroView UDN Client Setup 🛛 🗕 🗙
Produc Select	the way you want features to be installed.
	UDN Core Office Add-ins V Word Excel
This fea subfeat	ature requires 2144KB on your hard drive. It has 1 of 1 subfeatures selected. The sures require 543KB on your hard drive.

Figure 14. MacroView UDN Client Installation wizard

5.1.2 MacroView UDN Client Settings

By default Document IDs are automatically inserted the first time a document is opened from SharePoint or Saved to SharePoint. The Document ID will be updated whenever a document is opened in an editable form, 'Checked In' or 'Checked Out' from SharePoint, or if 'Required Check Out' is not enabled when the document is closed.

The settings for each Add-In can be accessed from the Options dialog in a dropdown from the Insert References button in Microsoft Word and Excel.

ଜୁ ୭ ଏ ÷	mv-000-001	8\1.0 - MacroView DMF	v7.9 InstallCo	onfigGuide.doo	cx [Comp	atibility Mode] - Word	Ē			
File Home Insert	Design La	yout References	Mailings	Review	View	♀ Tell me	Den	nis Louie	P₄ Sha	re
Open from SharePoint	Paste	- 10 <u>U</u> - abe x₂ x² <u>U</u> - Aa - A		≝ - '*; = = = \$ ⊞ - ≙↓	€≣ 7≣ ≣ * ¶	Insert Discard All Reference Changes	Aptions	A Styles	P Editing	
MacroView Cl	ipboard 🗔	Font	Es l	Paragraph	G.	UDN		Styles 🗔		~

Figure 15. MacroView UDN Client settings

In this dialog options exist to disable automatic insertion of a Document ID, control the visibility of the Insert Reference button in Microsoft Word and Excel and control the placement and format if the inserted reference.

MacroView UDN Options		×
General Advanced About		
Display language		
English (United States)		
Word options		
 ✓ Display Insert Reference button in Word ✓ Automatically insert Reference into document footers Automatic footer reference insert position: Start Add new paragraph when automatically inserting footer Reference Include additional text with footer Reference: ✓ Display document version in the Word window title ✓ Suppress 'Checked Out' message bar 		
Excel options		
 Display Insert Reference button in Excel Automatically insert & update Reference in worksheet footers Display document version in the Excel window title Suppress 'Checked Out' message bar 		
	ОК	Cancel

Figure 16. MacroView UDN Client settings

5.1.3 Additional General Settings for Word/Excel

Automatic footer reference insert position - *Start* will insert the reference on the bottom left hand corner when saving a new document. *End* in conjunction with InsertReferenceIncludeNewParagraph enabled will leave the reference on the bottom right hand corner on saving a new document".

Add new paragraph when automatically inserting footer reference -Enabled with *End* set for InsertReferencePosition to have reference on the bottom right hand corner on saving a new document.

Insert Reference Additional Text - Allows additional characters to a reference.

Insert Reference Include Additional Text - Enter values to be included the referenced added to the document. Note spaces on their own will not be accepted and requires at least 1 character with spaces.

Suppress Checked Out Message Bar - Added option to Supress check out banner.

5.1.4 Insert Document ID Ribbon Button

MacroView UDN supports the manual insertion of references through a custom button on the Office Ribbon. This button is only enabled when the current document is stored in a Document Library which supports MacroView UDN.

<u> </u>
Insert
Reference

Figure 17. Insert Reference button

5.1.5 Configuring the Document ID format in Microsoft Word and Excel (UDN server)

If MacroView UDN Server is installed, the format of the Document ID is **determined** by the Reference Format set in the Numbering Scheme applying to the Document Library where the Document, Workbook or Presentation is saved. Refer to section 4.5.2 for further details.

5.1.6 Configuring the footer Reference position

Automatic footer reference insert position

This setting allows you to specify the placement of the document reference.

- "Start" will insert the reference before any existing text in the footer.
- "End" will insert the reference immediately after any existing text in the footer.

Add new paragraph when automatically inserting footer Reference

Enabling this setting will insert a new paragraph before or after the reference. When the reference position is set to 'Start' the additional paragraph is added after the document reference and is left aligned. When the reference position is set to 'End' the additional paragraph is added before the document reference and is right aligned,

Include additional text with footer Reference

Enabling this setting allows you to specify additional text to be included before or after the document reference. If the reference position is set to 'Start' the entered text is added immediately after the document reference. If the reference position is set to 'End' the entered text is added immediately before the document reference. This can be useful when spacing is required between existing footer text and the document reference when the reference is being place immediately after existing footer text. Note that the additional text must include at least one nonspace character.

5.1.7 Configuring the Document ID format in Microsoft Word and Excel at the client side

If MacroView UDN Server is not installed the format of the Document ID is determined by the reference format defined by the HKEY_CURRENT_USER\SOFTWARE\MacroView\Udn\ReferenceFormat registry value on the client computer.

Note that this key is not created automatically and needs to be manually added.



Figure 18. Sample footer

Reserved keywords to format the document reference information from properties of the relevant file.

Key Word	Comment
[Site Collection Name]	Inserts the name of the Site Collection where the file is saved.
[Site Collection URL]	Inserts the URL of the Site Collection where the file is saved.
[Site Name], [Site Title], [Web Name], [Web Title]	Inserts the name of the Site or Web where the file is saved (i.e. the lowest element in the folder hierarchy).
[Site URL], [Web URL]	Inserts the URL of the Site or Web where the file is saved.
[Library Name], [Library Title]	Insert the name of the Document Library where the file is saved.
[Library URL]	Insert the URL of the Document Library where the file is saved.
[Modified:dd MMM	Inserts the date on which the document was last modified. The date can be displayed in a large number of

Key Word	Comment
уууу]	formats (any valid .Net 'DateTime' format) (e.g. [Modified: yyyy MMM dd] - <i>'Modified: 2011 Jan 28'</i> , [Modified: dd/MM/yy hh:mm:ss] - <i>'Modified: 25/12/11</i> <i>12:41:30'</i>).
[Version]	Inserts the version of the document. When a document is opened in an editable state MacroView UDN will insert a suffix after the version number. The default suffix is 'a' (e.g. mv-001/1.0a). The suffix is removed when the document is checked in, (or closed if the document is not in a library with 'Required Check Out' enabled). The suffix may be customised in the Registry. Please contact MacroView for further details.

The following Reference Format specifies a concatenation of the document library title 'Acme Premises Sale' with the unique document numbering column (MQ2XSX-123-9) with the current Version Number (1.3):

[Library Name] : [Document ID Value] / Version: [Version]

e.g. Acme Premises Sale : MQ2XSX-123-9 / Version: 1.3

5.1.8 Display information in the Application Window Caption

i.

MacroView UDN supports the display of the Reference in the Window Caption for Microsoft Word and Excel. By default this will display the Reference in the same format as displayed in the footer, however this is customisable through the Registry. Please contact MacroView for further information.

🔟 🚰 🤊 - ថ 🖙 🚺 🛄 🕅	00-0910 / 0.1 New Document.docx - Microsoft Word	
File Home Insert Page Layout	References Mailings Review View Developer	۵ 🕜
Calibri (Body) 11 Paste 3 A 4 A 4	E * E * 伝* 律律 ■ 書 書 単 ほ* タマ 田 * 2↓ ¶ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	
Clipboard 🕼 Font 🕼	Paragraph 🗔 Styles 🗔 New Group	
۹		
On-the Insert tab, the galleries incluyed on the Insert tab, the galleries incluyed on the set of t	ude-items-that-are-designed-to-coordinate-with-the-overall-loo •galleries-to-insert-tables,-headers, footers, lists, cover-pages,-	ik-of- and-

Figure 16. Custom Window Caption

5.1.9 MacroView UDN dialogs

MacroView UDN replaces the default Microsoft Office dialogs which appear for 'Check-In' and 'Discard Check Out' of a Document, Workbook or Presentation. For a Document or Workbook the default dialogs on 'Close' have also been replaced. These custom dialogs replicate the standard Microsoft Office user experience.



Figure 17. MacroView UDN Save on Close Dialog



Figure 18. MacroView UDN Check In on Close Dialog



Figure 19. MacroView UDN Check In dialog

MacroVie	w UDN	—
?	Other users cannot see your changes until you check in. Do you want to check in now? Yes No Cancel	

Figure 20. MacroView UDN Check In on Close Dialog

5.1.10 Discard All Changes Button

MacroView UDN supports the discarding of all changes made to a document before the document has been checked in. All changes include any revisions

made and saved using the save icon



Figure 21. Discard All Changes Button in the ribbon

MacroVie	w UDN	\times
?	You are about to discard all changes that have made and close the document. This includes changes that have been saved but not checked in. Are you sure you want to discard all changes?	
	<u>Y</u> es <u>N</u> o	

Figure 22.Warning message to indicate all changes will be lost

5.1.11 Saving a new document

When saving a new document using Save to SharePoint, MacroView DMF first saves the document then MacroView UDN checks out the document, updates the document reference in the footer and checks the document in.

If auto check-out is enabled in MacroView DMF then MacroView UDN checks out the document and you can than continue making changes to the first version of the document.

If auto check-out is disabled in MacroView DMF then MacroView UDN will allow the file to remain open for editing and co-authoring. The file remains checked in. This means if you're using a version of Office with the new AutoSave feature (e.g. Office 365) a second version is then automatically created as soon as AutoSave fires or the next time the user saves the document.

5.2 Advanced Office Integration (AOI) Functionality

5.2.1 MacroView AOI Overview

MacroView Advanced Office Integration (AOI) provides enhanced functionality to MacroView UDN when saving Word and Excel documents to SharePoint. Compared to the standard Word / SharePoint experience when closing and saving a document, it:

- Provides users with more granular control over version creation; and
- Minimizes the prompting to end users

5.2.2 MacroView AOI Prerequisites

Ensure that the document libraries:

- Major or Minor Versions enabled
- Require Checkout before Edit disabled.

Document Version History Specify whether a version is created each time you edit a file in this document library. Learn about versions.	Create a version each time you edit a file in this document library? No versioning © Create major versions Example: 1, 2, 3, 4 (construction)
	 Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0

Figure 23.MacroView AOI Versioning Setting

5.2.3 Save Options for different library version settings

The Save Changes option when saving a documents vary based on the current version of the document being saved and its libraries version settings.

Save Changes	×
• Save As New <u>V</u> ersion (1.2)	
Save As New <u>M</u> ajor Version (2.0)	
Save As New <u>D</u> ocument	
 Overwrite Existing Version (1.1) 	
Version <u>C</u> omments	_
OK Cance	



The following options are provided for each combination of document and library version settings.

Library version setting	Original document version	Save Options	New document version
Majors	2.0	Save As New (3.0)	3.0
		Save As New Document	1.0
		Overwrite Existing Version (2.0)	2.0
Majors	1.5	Save As New Version (1.6)	1.6
and Minors		Save As New Major Version (2.0)	2.0
		Save As New Document	1.0
		Overwrite Existing Document (1.6)	1.6
	2.0	Overwrite Existing Document (2.0)	Disabled*
None	1.0	Save As New Document	1.0
		Overwrite Existing Document	1.0

Note*: SharePoint does not allow you to overwrite an existing major version of a document in a Minor Version enabled library.

5.2.4 Saving As New Version

In this example, we will look at opening an existing Word document which is currently version 1.0 from a library with major versions enabled.

Select a Word Document from a library in MacroView DMF Explorer or from *Open from SharePoint* in Word.

Library Tools	Library Tools MacroView DMF Explorer 🗖 🖸 🔀							• **				
File Home Library												
Browse Favorites Recent Search Matters	P	aste	copy Copy as Link	Add t Favori	o Open Ve tes + Hi	rsion story	Check Ou	it Theck Out	Properties	Manage Permissions	動 Rename 🗙 Delete	initia de la constante de la
4 🚠 dennis	-	Туре	Name	. aron	Modified	oper	Modified By	Check	ed Out To	Version	Document	ID 🔺
🔺 🔃 Dennis	-		error msg.jpg		10/4/2012 4:09 F	м	Dennis Louie			1.0	0624a	
Cutcopymove			ERRORTRACE01	Oct201	10/2/2012 11:24	АМ	Dennis Louie			1.0	0605a	
📴 Display test		1	Exception while	assigr	9/25/2012 10:01	AM	Dennis Louie			1.0	0557a	
KVDL doc		1	Expense for 201	213.xls	9/11/2012 9:24 #	м	Dennis Louie	Denn	is Louie	2.0	0458a	
KVDL no2			Favourite folder	s.jpg	10/4/2012 4:09 F	м	Dennis Louie			1.0	0623a	
macro		(11)	feeeee.docx		9/13/2012 10:39	AM	Dennis Louie			4.0	0494a	
MV content type		\geq	FW MacroView	deplo	9/27/2012 10:58	AM	Dennis Louie			1.0	0595a	
Rewone 🔤		1	kvd2.doc		10/5/2012 10:17	AM	Dennis Louie			1.0	0636	
permissions		P	kvdl - Copy (1).d	oc	10/5/2012 10:18	AM	Dennis Louie			1.0	0638	
Real Documents			kvdl - Copy (1)2.	doc	10/5/2012 10:21	AM	Dennis Louie			3.0	0640	
▷ 📴 test		1	kvdl.doc		10/5/2012 10:16	AM	Dennis Louie			1.0	0634	
Dennis2							1 - 100	•				-
Employee Engagement	*	•										
<u></u>												

Figure 25. MacroView DMF Explorer with a Word document selected for opening – note version 1.0

Open the Document and make some changes. When you have finished making changes, click the X to close Word.

[w 🛒 🤊 -	じ ∓	http://den	nis08/_layouts/	DocIdRedir.asp>	?ID=0557a, 0557a\1.0	a - Excepti	on while assig	ning Docume	nt ID.docx - M	i 0	
	File	Home	Insert	Page Layout	References	Mailings Revie	ew Vie	w				۷ م
		Calibri (Body) 👻	12 × A A	Aa 🔹 🎒	;= · ;= · ;=· ■ = = ;	∰ ∰ ≣-	AaBbCcDdi	AaBbCcDdI	AABBCC	A	#
	Paste 🛷	BI	<u>U</u> * abe	x, x ²	* 📴 * <u>A</u> *	<u>&</u> - ⊡ - <u>≵</u> ↓	¶	¶ Normal	No Spacing	Heading 1	Change Styles *	Editing
	Clipboard 🕞			Font	Fa	Paragraph	Fa		Styles		5	

Figure 26. Main Word ribbon with Close button highlighted

You will then be prompted by the AOI Close Dialog below.

Close Document		
Do you want to sa	Save Do <u>n</u> 't Save Ca	assigning Document ID.docx? ncel

Figure 27. AOI Close Dialog

If you select Save, you will see the following prompt.

Save As
Save As New Version (2.0)
Save As New Document
Overwrite <u>E</u> xisting Version (1.0)
Version <u>C</u> omments
OK Cancel

Figure 28. AOI Save As dialog with Save As New Version selected

Select Save As New Version and enter a New Version comment.

Version (2.0) describes the next proposed version of the document.



Figure 29. Version has been incremented

5.2.5 Overwrite Existing Version

When saving a document, if you would prefer to save your changes but keep the same version number select Overwrite Existing Version.

Note Version Comments will display from text previously saved in the comment section.

Version (1.0) indicates the Version you wish to overwrite.

Save	: As 💽				
\bigcirc	Save As New <u>V</u> ersion (2.0)				
Save As New Document					
Overwrite Existing Version (1.0)					
Version <u>C</u> omments					
	Updated changes from October 13				
	OK Cancel				

Figure 30. AOI Save As dialog with Overwrite Existing Version selected

5.2.6

Save As New Document

When saving a document, if you would prefer to save your changes as a completely new document, follow the same steps in section 5.2.3, except in the AOI *Save As* dialog, select *Save As New Document* and click *OK*. You will then be prompted with the standard MacroView DMF *Save to SharePoint* dialog.

Save As					
Save As New Version (2.0)					
Save As New Document					
Overwrite Existing Version (1.0)					
OK Cancel					

Figure 31. AOI Save As dialog with Save As New Document selected

	Library Tools			:	Save to	o ShareP	oint							23
File Home	Library													
Browse Favorites Rece	ent Search Matters	Paste	ž	Cut Copy	Copy	as A k Fa	dd to	Op	Nersion History	eck Out eck In card Check Out	© × ø	Share		
Mod	e		C	lipboard		Fa	vorites		Open & Check	Out	Mana			
Dennis				lype		lame			Modified	Modified By	Checke	d Out Io	Ver	sion 🔶
Length Cutcopyn	nove			M	0	0000.do	CX		10/5/2012 3:38 PM	Dennis Louie			2.0	
Display to	est			E.	1	2313212	315.docx		9/4/2012 11:09 AM	Dennis Louie	Dennis	Louie	2.0	
KVDL doe	c .		≣	2007test.docx		10/5/2012 9:39 AM	Dennis Louie	Dennis	Louie	2.0				
KVDL no2	2			1	3	2.docx			10/5/2012 9:11 AM	Dennis Louie	Dennis	Louie	6.0	
🔺 🖳 macro				1	3	2aio.doo	х		10/5/2012 9:21 AM	Dennis Louie	Dennis	Louie	4.0	
🛛 🔋 📔 Folde	ers			1	3	2aio2.do	cx		10/5/2012 9:31 AM	Dennis Louie	Dennis	Louie	3.0	
Cont	ent Type			1	3	2aio2dfg	yfd.docx		10/5/2012 11:52 AM	Dennis Louie	Dennis	Louie	4.0	
Image: Second	25			1	3	2aio2dfg	gfdssdd.o	locx	10/5/2012 11:54 AM	Dennis Louie			2.0	
D 🏄 job				-	3	Se.docx			10/5/2012 8:50 AM	Dennis Louie	Dennis	Louie	4.0	
🕨 🊄 newr	newnew				3	5e2.doo	(10/5/2012 11:56 AM	Dennis Louie			2.0	
MV conte	ent type								1 - 81	1				-
Newone			Ŧ	4						-				F .
File name: Exception	while assigning Doc	ument ID		rt 2 docv										_
Cheption	while assigning bot	ument ib	Pa											
File type: .docx														•
											Cours		Conner	
											save		Cance	

Figure 32. MacroView DMF Save to SharePoint dialog

5.2.7 Discarding Changes

If you want to discard all uncommitted changes, click on the Don't Save button in the AOI Close Dialog. Any previously committed changes are preserved (i.e. changes that have been made prior to clicking on the standard Word Save button or pressing Ctrl-S).

5.2.8 Discard All Changes Button

See point 4.1.7

5.2.9 Save As to SharePoint

You will also be prompted with the AOI Save As dialog when you click the Save As to SharePoint button in the File tab in the Word ribbon.





5.2.10 Disable overwriting versions saved by another user

To prevent users from overwriting the previous version for a document if they were not the person that created that version, check the *Don't overwrite other user's versions* option.

MacroView UDN Options		×
General Advanced About		
Advanced options		
Don't overwrite other user's versions		
Close checked out documents when restoring edit state		
✓ Enable AOI in all libraries		
	ОК	Cancel
	U.S.K	Cancer

Figure 34. Advanced options (only available in Word when using AOI)

With this option enabled, when the previous version was saved by a different user, the Save Changes dialog will include the option to overwrite the existing version.

Save Changes	×
Save As New <u>V</u> ersion (20.0)	
○ Save As New <u>D</u> ocument	
Version <u>C</u> omments	
Check Out the document after saving changes	
OK Cancel	

Figure 35. Take note of the Check-out setting

5.2.11 Close Document When Restoring Edit State

Added option to automatically close and reopen a checked-out document on saving

5.2.12 Saving a document that has not been checked out

When working on a document that has not been checked out, any changes will result in a new version. If after saving the document you want it to be checked out so that further changes can later be made to that same version, check the *Check Out the document after saving changes* option.

This option will only appear if the document isn't already checked out and the location has versioning enabled. If you don't check out the document after saving changes, subsequently saving the document will create an additional version as per standard office behaviour.

5.2.13 Enable AOI In All Libraries

MacroView UDN Options	×
General Advanced About	
Advanced options	
 □ Don't overwrite other user's versions ✓ Enable AOI in all libraries 	
	OK Cancel

From AOI v6.3.9 and later, AOI functionality can now be used in locations that don't have the Document ID featured enabled.

See <u>4.6</u> for more information.

5.2.14 Co-authoring support in AOI

Multiple people are able collaborate on the same document at the same time.

How to enable co-authoring with DMF and AOI

The DMF option *Auto check-out Word documents on open* should be disabled (unticked) by each user in order to use co-authoring, as it's not possible to co-author checked out files.

Word
Auto check-out Word documents on open

Each user can then open the same document and other users in the coauthoring session are displayed in the ribbon.

✓ Search (Alt+Q)	Dennis Louie 🔗
	S O Comments

Documents opened using DMF allow native Word co-authoring functionality such as changes being tracked by the green highlights when each user presses the Word save button.

Users enabling AutoSave will see changes in near real-time.



While co-authoring, each user's saves may cause additional versions to be created in SharePoint.

This document started at version 1.0 and while two users were editing two additional versions were created, incrementing to version 3.0.



AOI functionality becomes available when the document is closed by the last user in the co-authoring session.

This user controls the version and any comments it may contain.

Save Changes	×
Save As New Version (4.0)	
○ Save As New <u>D</u> ocument	
Overwrite Existing Version (3.0)	
Version <u>C</u> omments	
Check Out the document after saving changes	
OK Can	cel

Things to note

The AOI Save Changes functionality is disabled when there are multiple users co-authoring and clicking Save as to SharePoint invokes the standard DMF Save As behaviour.

6. Getting Help

6.1 What Version?

6.1.1 MacroView UDN Server

Navigate to Central Administration -> Service Application -> MacroView UDN Service Application. This page displays the version number of the MacroView UDN Server which you are running.

Manage Uniqu	ue Numbering 🛛	
🚔 New Scheme		
Scheme Name	Numbering Format	Reference Format
Documents	mv000	[Document ID Value][Version]
Documents - Copy	MMM000	[Document ID Value][Version]
MV19	MV19-000000-00000	[Document Id Value]/[Version]
Precedents	P000	[Document ID Value]
Second Documents	mv-000-000	[Version]
Version: 6.0.2.0		

6.1.2 MacroView UDN Client

Navigate to the UDN Options dialog referred to in 5.1.2 and select the *About* tab. This displays a screen similar to the following, which shows what release of MacroView UDN you have installed. Note if you have MacroView AOI installed it will be the same version as appears in this dialog.

MacroView	UDN	\times					
Options Ma	About CroView						
MacroVie Version: Copyrigh Warning	MacroView UDN Version: 6.1.4.0 Copyright © MacroView Business Technology. All rights reserved. Warping: This software is protected by copyright laws						
Website:	www.macroview365.com						
Email:	support@macroview.com.au						
Phone:	+61 2 9249 2700 (Australia)						
	(866) 589 4939 (USA - toll free)						
	ОК						

Figure 34. MacroView UDN About dialog

It also shows;

- the URL of the MacroView website, which contains extensive information about MacroView UDN, including a Support Form and Knowledge Base.
- the email address and phone numbers for MacroView Support. Note that contact with MacroView Support may need to be coordinated through your central IT Department or Helpdesk.

6.2 Log Files

6.2.1 MacroView UDN Client and AOI Client

As they run, MacroView UDN and MacroView AOI log to a file, which can be very useful for diagnosing and resolving usage issues. The log file is located at: '%*AppData%/MacroView Udn/log-file.txt*'.

7. Installed Server Components

The following components are installed when you deploy the solution 'MacroView Unique Document Numbering.wsp'

Note: The '14' folder is usually located at C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\

14\Template\Admin\UDNServiceApplication\Create.aspx

14\Template\Admin\UDNServiceApplication\Settings.aspx

14\Template\Admin\UDNServiceApplication\EditNumberingScheme .aspx

14\Template\Layouts\macroview.udn\Library.aspx

14\Template\Layouts\macroview.udn\SiteCollection.aspx

14\Template\Layouts\macroview.udn.service.asmx

14\Template\Features\ MacroView.SharePoint.UniqueNumbering.2010_UDNServiceApplica tion

14\Template\Features\MacroView.SharePoint.UniqueNumbering.2 010_Site

14\Template\Images\macroview.udn\DMFLogo32.png

14\Template\Images\macroview.udn\Feature.gif

14 \Template
\SQL \UDNService
Application
\UDNService
Application .sql

14\WebClients\UDNServiceApplication\client.config

 $14 \verb+WebServices+UDNServiceApplication+UDNServiceApplication.svc$

14\WebServices\UDNServiceApplication\web.config

Windows\Assembly\MacroView.SharePoint.UniqueNumbering.dll

Windows\Assembly\macroview.udn.common.dll

8. Removing MacroView Unique Document Numbering Software

8.1 Retract the solution

Running the following command on a SharePoint server located in a SharePoint 2010 or later Server Farm will deactivate the Solution on all Web Front End servers in that Farm:

Uninstall-SPSolution -Identity "MacroView Unique Document Numbering.wsp"

8.2 Delete the solution

Running the following command on a SharePoint server located in a SharePoint 2010 or later Server Farm will remove the Solution from all Web Front End servers in that Farm:

Remove-SPSolution -Identity "MacroView Unique Document Numbering.wsp"

9. Appendix

9.1 Load Balancing

UDN Server v6 is load balanced using the <u>SPRoundRobinServiceLoadBalancer</u> and this is supported on SharePoint 2013, 2016 and 2019 servers with the Front-end or Application roles

A new Install-mvUDNService PowerShell Cmdlet has been added. This enables installation and provisioning of the UDN service to other servers in the farm. This Cmdlet would be used when the UDN server is already deployed and a new server that should host the UDN service is joined to the farm. It can also be used to install the UDN service on other servers after upgrading an existing deployment to UDN Server v6. There is an optional -Provision switch parameter which, if supplied, brings the UDN service instance online after installing it. This parameter should only be specified if a UDN Service Application has already been created. The Cmdlet is idempotent so running it multiple times on the same SPServer has no effect if the service is already installed and online.

Farm Infor	mation						
Configura	tion database version: 16.0.4600.	1001					
Configura	tion database server: jtsp2016						
Configura	tion database name: SharePoin	t_Config					
Server	SharePoint Products Installed	Role	Com	pliant	Services Running	Status	Remove Server
JTSP2016	Microsoft SharePoint Server 2016	Front-end with Distributed Cache	\odot	Yes	App Management Service Business Data Connectivity Service Central Administration Distributed Cache <u>MacroNiew UDN Service</u> Maraoged Metadata Web Service Microsoft SharePoint Foundation Database Microsoft SharePoint Foundation Web Application PerformancePoint Service Secure Store Service User Profile Service	No Action Required	Remove Server
TSP2016A	Microsoft SharePoint Server 2016	Application with Search	0	Yes	App Management Service Business Data Connectivity Service Machine Translation Service MacroView UDN Service Managed Metadata Web Service Microsoft SharePoint Foundation Incoming E-Mail Microsoft SharePoint Foundation Workflow Timer Service Search Host Controller Service Search Query and Site Settings Service Search Guery and Site Settings Service Secure Store Service SharePoint Server Search User Profile Service	No Action Required	Remove Server
JTSP2016B	Microsoft SharePoint Server 2016	Front-end	\odot	Yes	App Management Service Business Data Connectivity Service Machine Translation Service MacroView UDN Service Managed Metadata Web Service Microsoft SharePoint Foundation Web Application PerformancePoint Service Secure Store Service User Profile Service	No Action Required	Remove Server

If you have 2 front-end servers each running the UDN service, configure an alternate access mapping for the second server so that you can address each front-end separately in DMF or the web browser. Examine each front-end server's ULS traces after uploading a file via each, looking for entries that contain UDN.svc.

You should see entries similar to:

WcfSendRequest: RemoteAddress: 'http://jtsp2016 :32843/ae9c72ee483549818a05f71778f6991a/UDN.svc' Channel: 'MacroView.SharePoint.UniqueNumbering.IUDNService' Action: 'http://tempuri.org/IUDNService/GetNextIdFromNumberingScheme'

WcfSendRequest: RemoteAddress: 'http://jtsp2016b:32843/ae9c72ee483549818a05f71778f6991a/UDN.svc' Channel: 'MacroView.SharePoint.UniqueNumbering.IUDNService' Action: 'http://tempuri.org/IUDNService/GetNextIdFromNumberingScheme'

The RemoteAddress indicates the SharePoint server address returned by the SPRoundRobinServiceLoadBalancer that handled the UDN service application proxy request. In the example above both jtsp2016 and jtsp2016b had UDN

service instances that were responding to service application proxy requests to the same UDN service application.

9.2 Upgrading from version 5.1.X

Please refer to the Server Upgrade Guide