

MacroView Unique Document Numbering and Advanced Office Integration

Version 7

Administration Guide

July 2023

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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 \(MacroView AOI\)](#).

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Contents

1.	Introduction	1
2.	Technical Requirements.....	2
2.1	Workstations	2
2.2	Servers.....	2
3.	MacroView UDN Installation Overview.....	3
3.1	Using the standard Microsoft SharePoint Document ID Service	3
3.1.1	Configuration using the standard Microsoft SharePoint Document ID Service	3
3.2	SharePoint On-Premises using the MacroView UDN Document ID Provider.....	5
4.	MacroView UDN Server	6
4.1	Summary.....	6
4.2	Deploy the solution.....	6
4.3	Activate the MacroView Unique Document Numbering Licence	6
4.4	Create the service application	6
4.4.1	Check the service	6
4.4.2	When the Service is not running	6
4.4.3	Create a new service application	9
4.4.4	Configure the service application	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	Reference Format in other languages.....	12
4.5.4	Next Number.....	13
4.6	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	Displaying the Document ID as a column in MacroView DMF or a SharePoint View	15
4.10	Upload a document into SharePoint.....	16
5.	MacroView UDN 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	Insert Document ID Ribbon Button	19
5.1.5	Configuring the Document ID format in Microsoft Word and Excel (UDN server) ..	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 side 20	
5.1.8	Display information in the Application Window Caption	21
5.1.9	MacroView UDN dialogs	21
5.1.10	Discard All Changes Button	22
5.1.11	Saving a new document.....	23
5.2	Advanced Office Integration (AOI) Functionality	23
5.2.1	MacroView AOI Overview	23
5.2.2	MacroView AOI Prerequisites	23
5.2.3	Save Options for different library version settings.....	23
5.2.4	Saving As New Version.....	25
5.2.5	Overwrite Existing Version	26
5.2.6	Save As New Document	27
5.2.7	Discarding Changes.....	27
5.2.8	Discard All Changes Button	27
5.2.9	Save As to SharePoint.....	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.	Getting Help	31

- 6.1 What Version?..... 31
 - 6.1.1 MacroView UDN Server..... 31
 - 6.1.2 MacroView UDN Client 31
- 6.2 Log Files..... 32
 - 6.2.1 MacroView UDN Client and AOI Client 32
- 7. Installed Server Components 33
- 8. Removing MacroView Unique Document Numbering Software 34
 - 8.1 Retract the solution 34
 - 8.2 Delete the solution 34
- 9. Appendix 35
 - 9.1 Load Balancing 35
 - 9.2 Upgrading from version 5.1.X..... 36

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

The screenshot shows the 'Site Settings' page with various navigation links. The 'Site collection features' link is highlighted with a red box. The links are organized into several categories:

- Users and Permissions:** People and groups, Site permissions, Access requests and invitations, Site collection administrators, Site app permissions
- Look and Feel:** Title, description, and logo, Quick launch, Top link bar, Navigation Elements, Change the look
- 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
- 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 Schema, Search Settings, Search Configuration Import, Search Configuration Export, Site collection features (highlighted), Site hierarchy

The screenshot shows the 'Document ID Service' configuration card. It includes a description: 'Assigns IDs to documents in the Site Collection, which can be used to retrieve items independent of their current location.' To the right of the card are two buttons: 'Deactivate' and 'Active'. The 'Active' button is highlighted.

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**
- HTML 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.

Assign Document IDs

Begin IDs with the following characters:

DEMO

Reset all Document IDs in this Site Collection to begin with these characters.

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

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 Acquisition > Contract and Agreement

	Name	Document ID	Version
	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

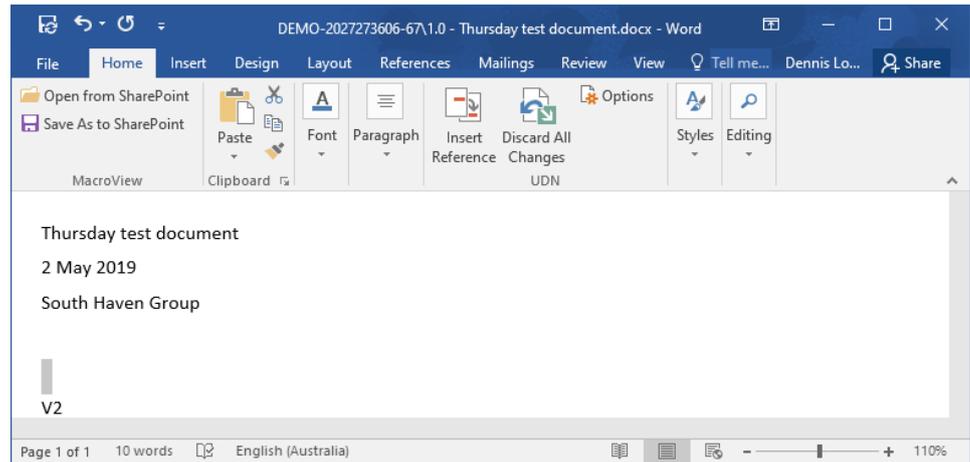


Figure 1 Document ID displayed when using UDN

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](#).

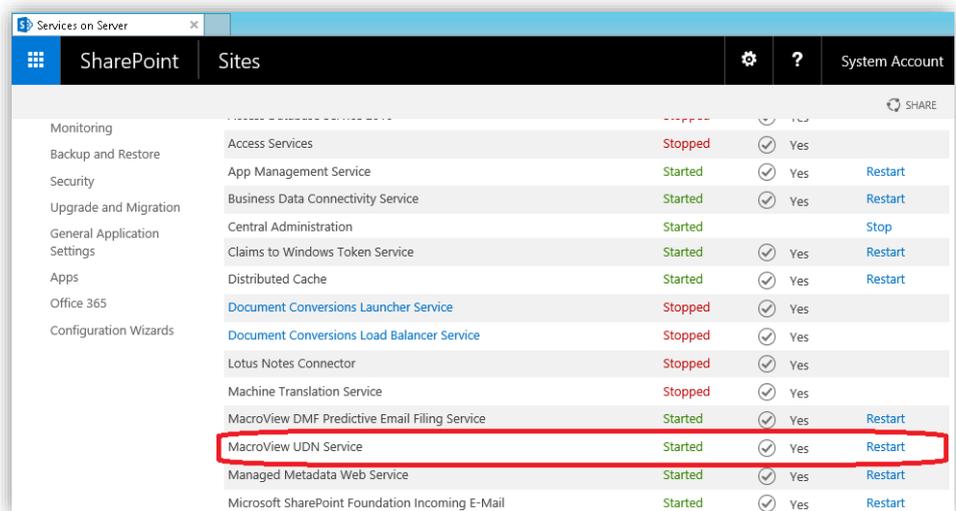


Figure 2 MacroView UDN Service

4.4.2 When the Service is not running

Use the below steps:

- Restart the SharePoint Timer Service

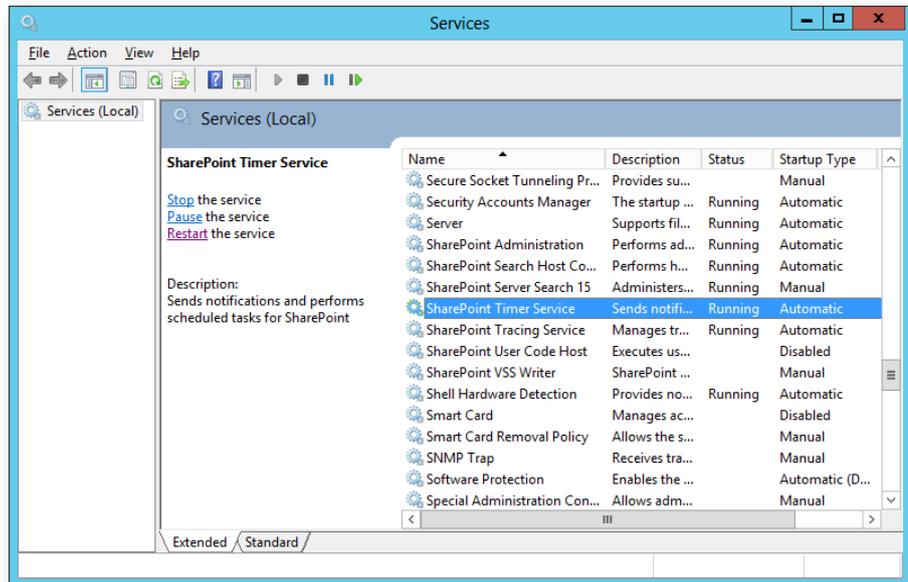
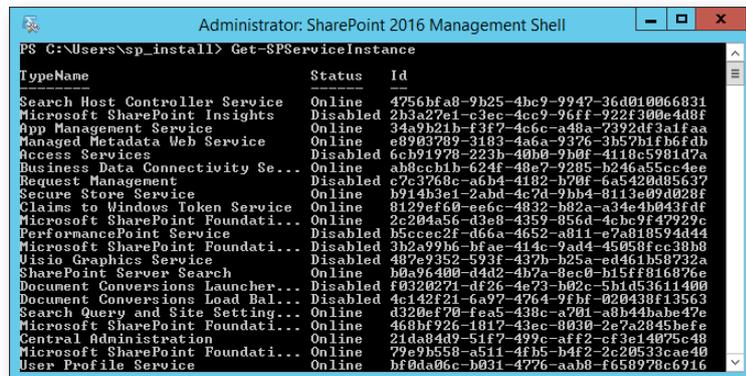


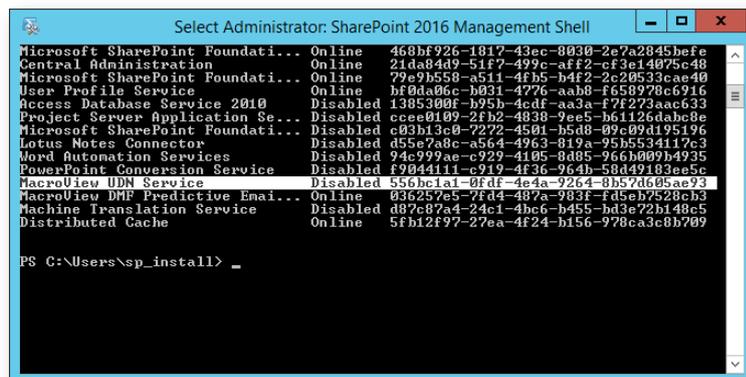
Figure 3 SharePoint Timer Service

- 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:

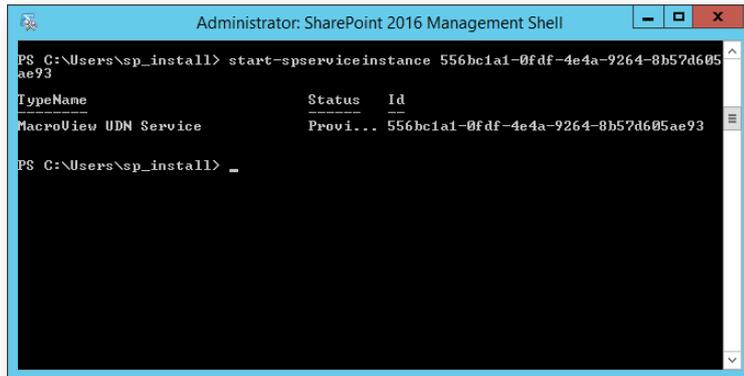
Get-SPServiceInstance



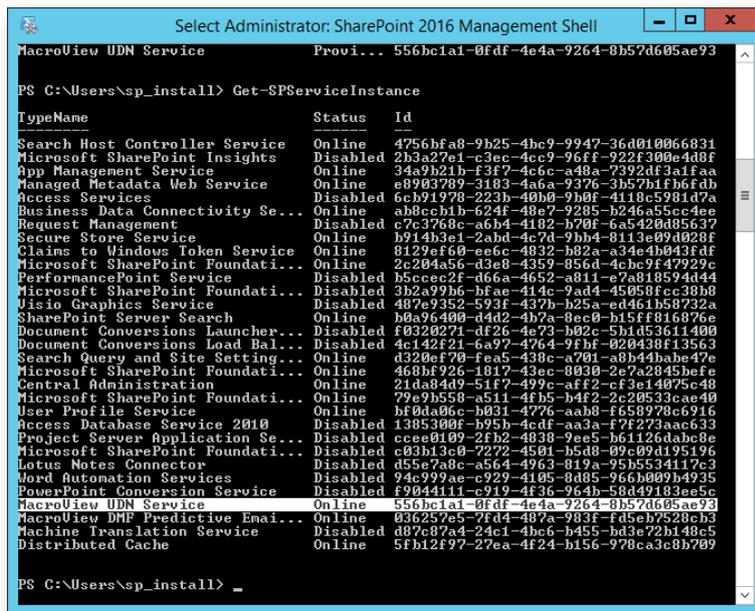
- Find the UDN service and its Identity



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

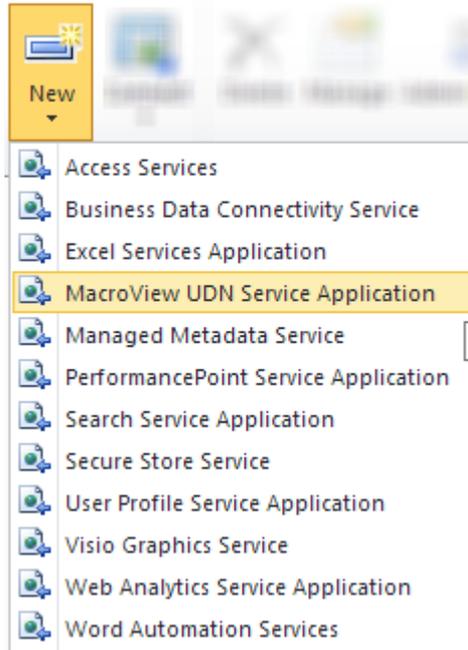


- Confirm the service is running



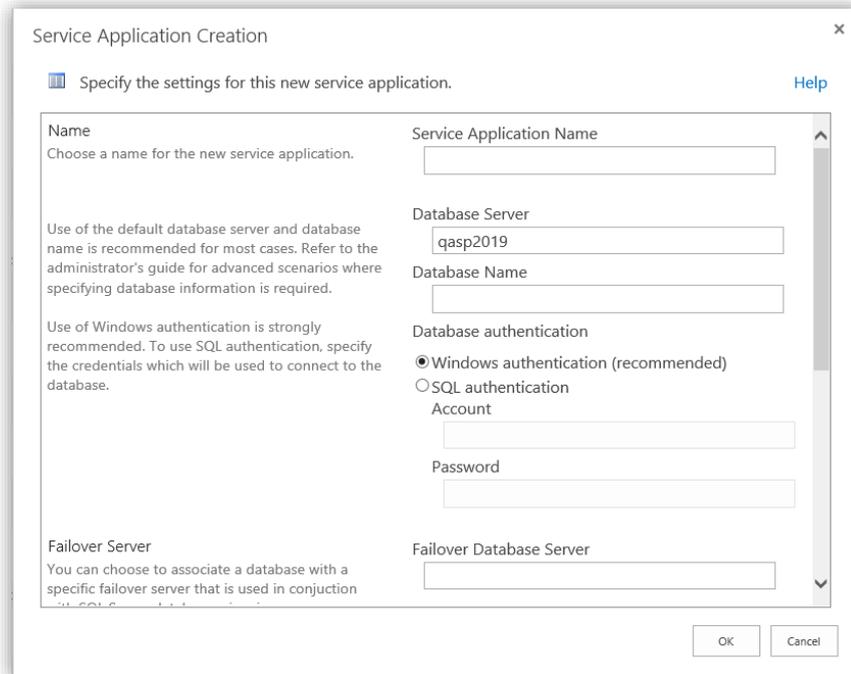
4.4.3 Create a new service application

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.



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

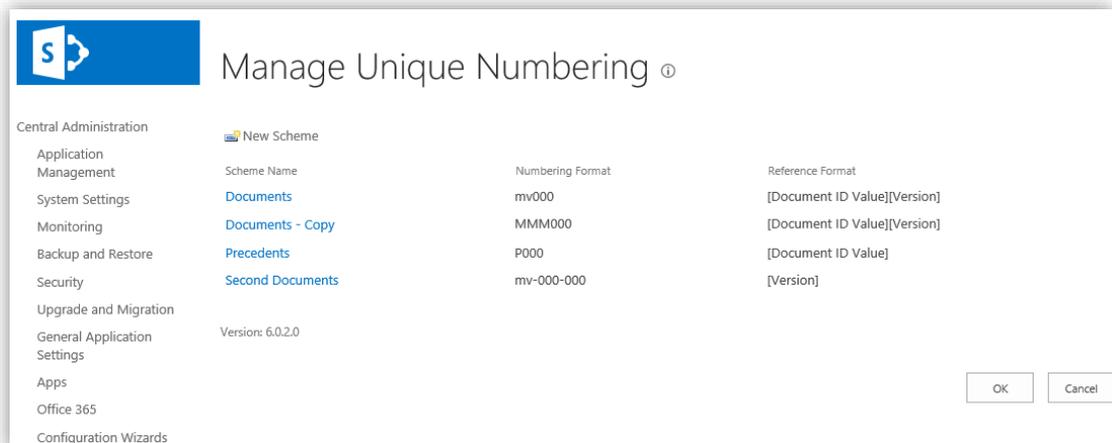
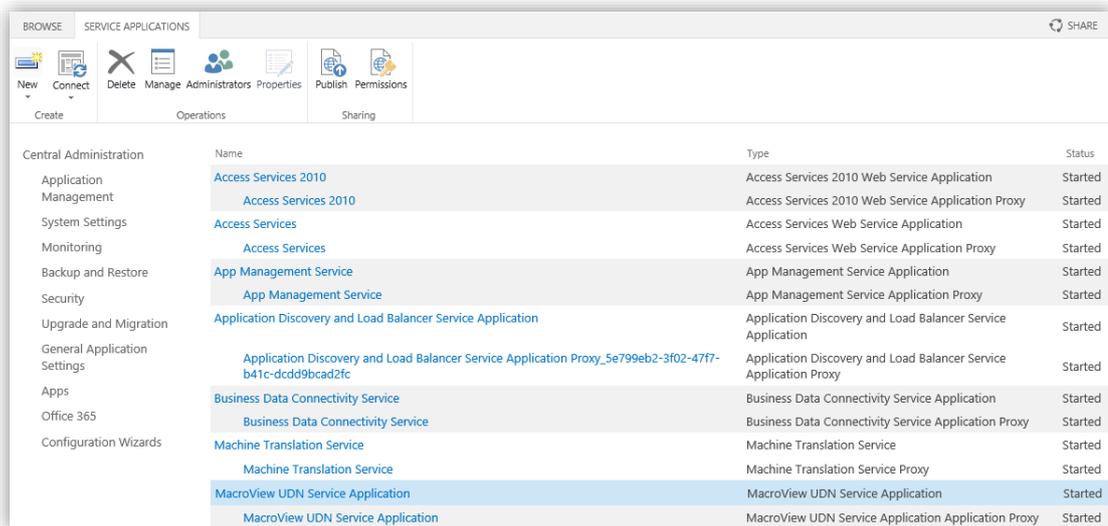
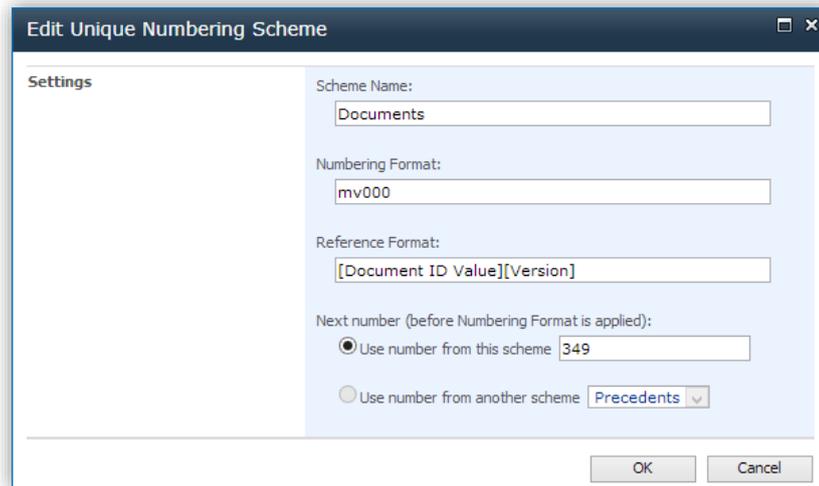


Figure 4. Setting up a numbering scheme

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



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.

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'.

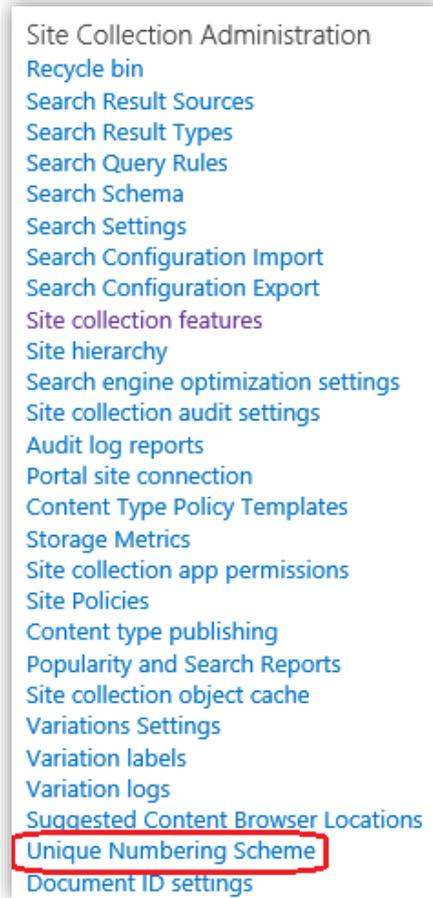


Figure 6. Choose the numbering scheme for a Site Collection

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.

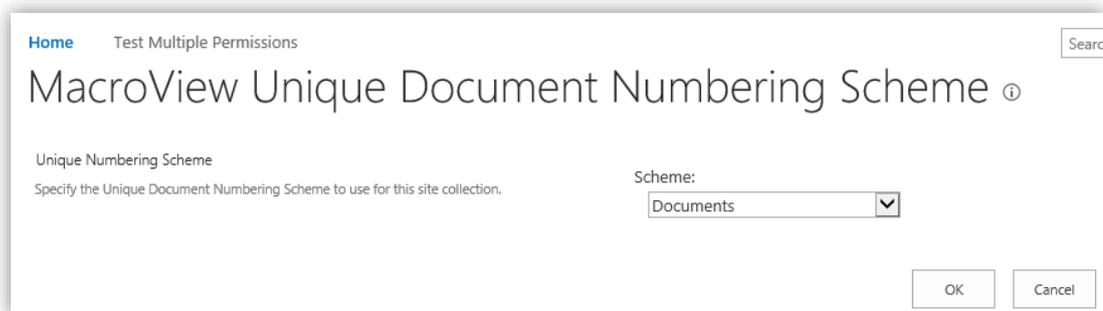


Figure 7. Choose the numbering scheme for a Site Collection

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.

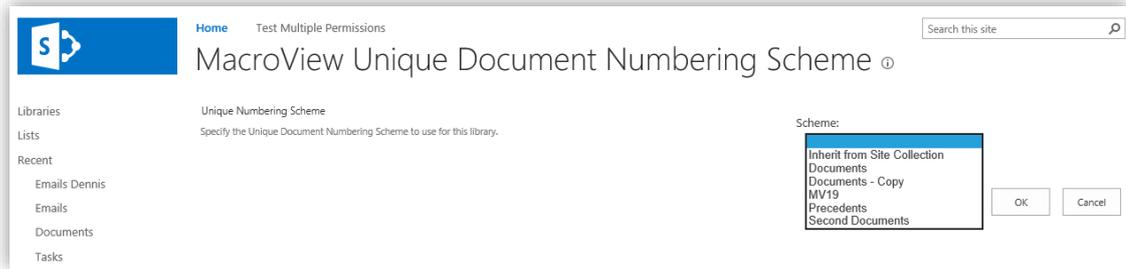


Figure 8. Choose the numbering scheme for a document library

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.



Figure 9. Display Document ID Column

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

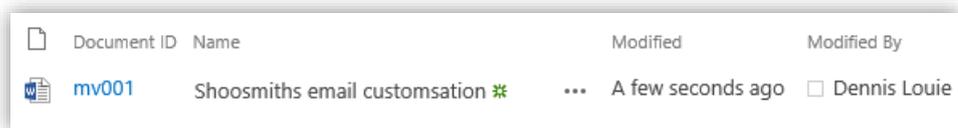


Figure 10. Display Document ID Column

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.

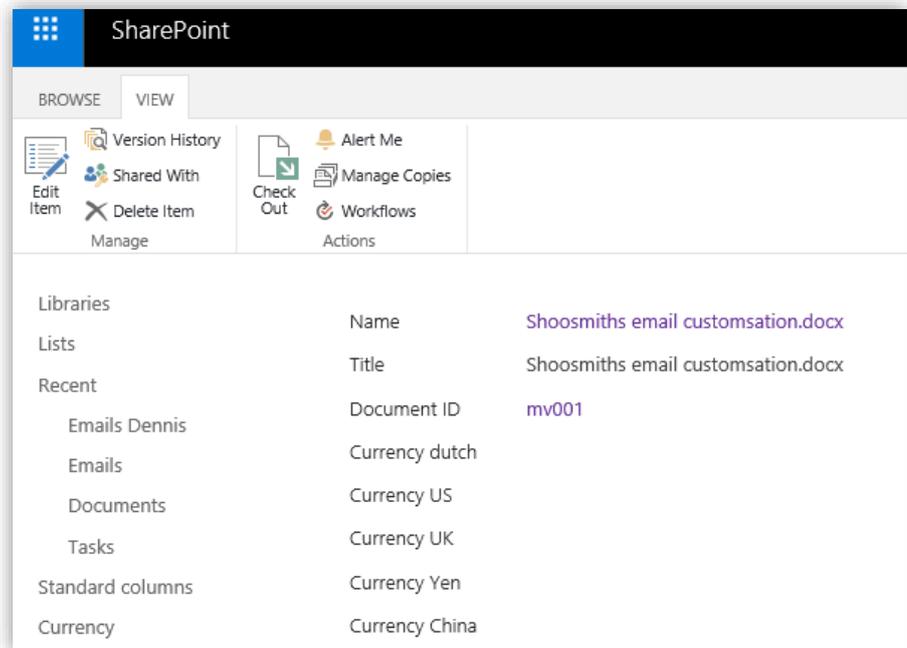


Figure 11. MacroView UDN document properties

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 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.

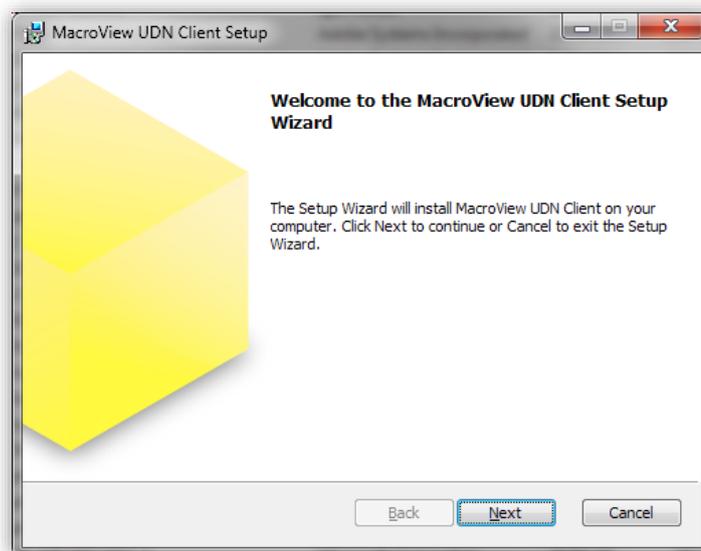


Figure 12. MacroView UDN Client Installation wizard

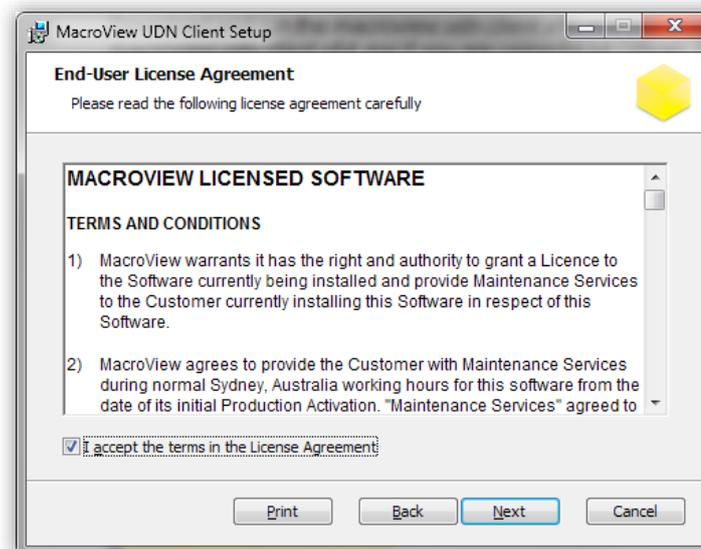


Figure 13. MacroView UDN Client Installation wizard

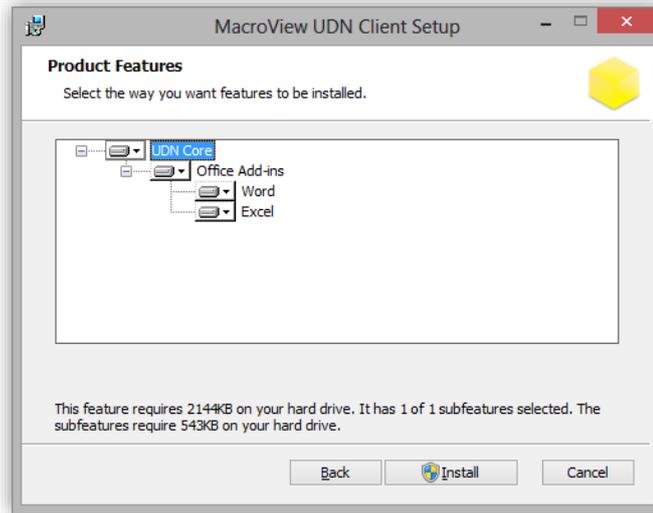


Figure 14. MacroView UDN Client Installation wizard

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.

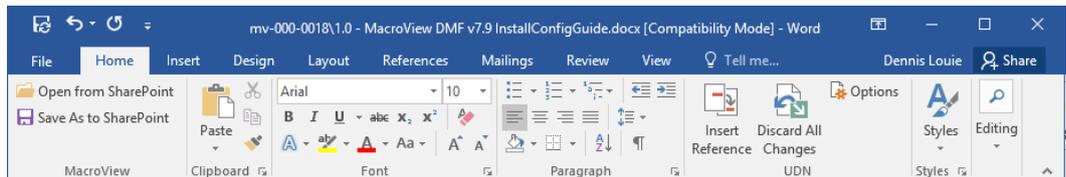


Figure 15. MacroView UDN Client settings

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.

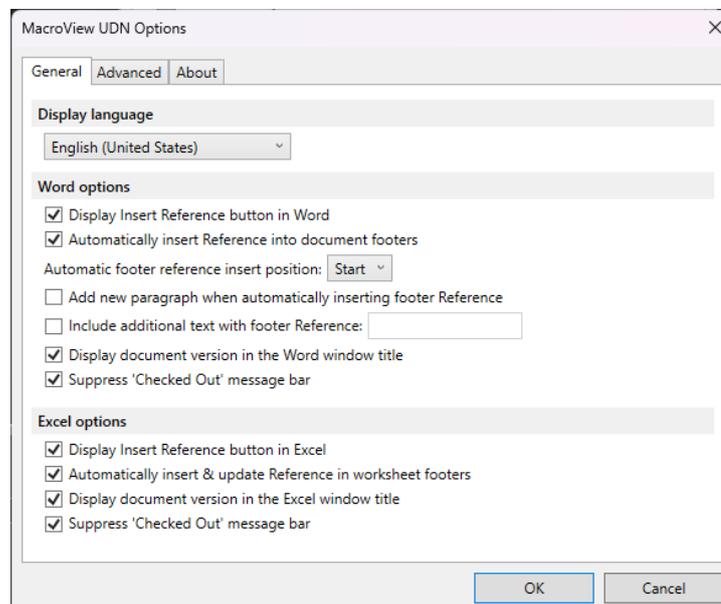


Figure 16. MacroView UDN Client settings

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 Suppress 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.



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 placed immediately after existing footer text. Note that the additional text must include at least one non-space 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.

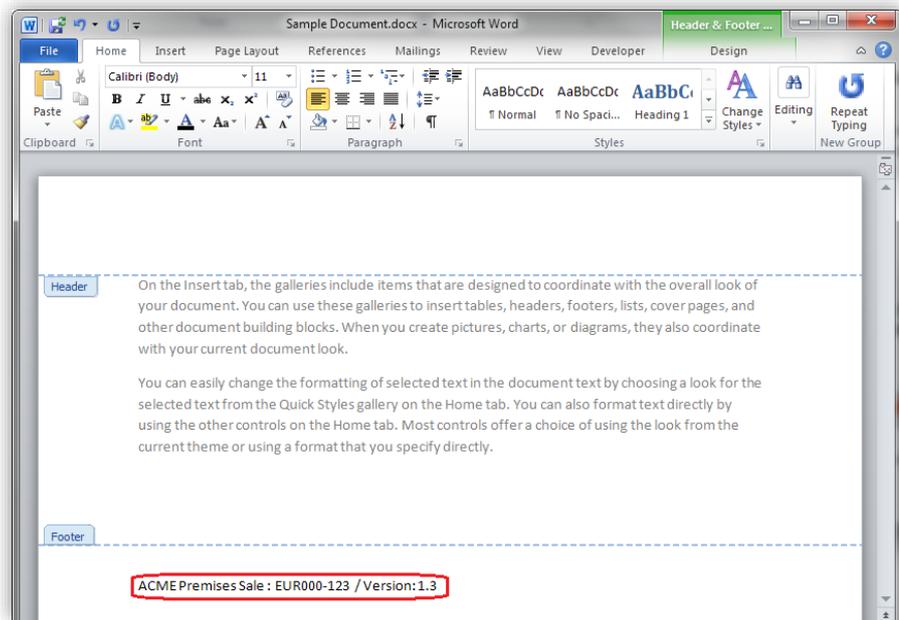


Figure 18. Sample footer

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
yyyy]	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 (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

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.

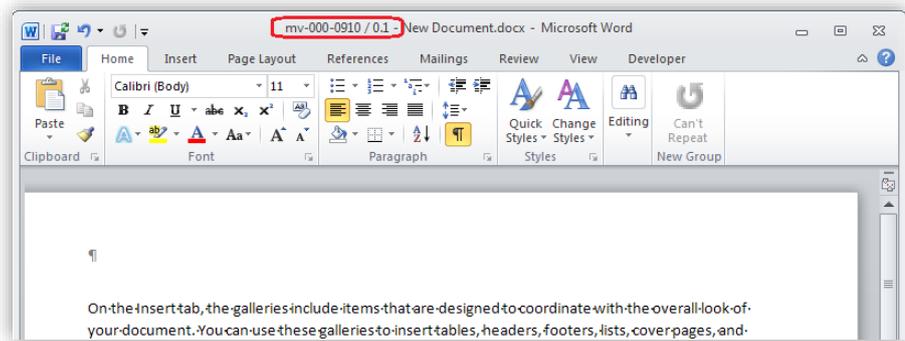


Figure 16. Custom Window Caption

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.

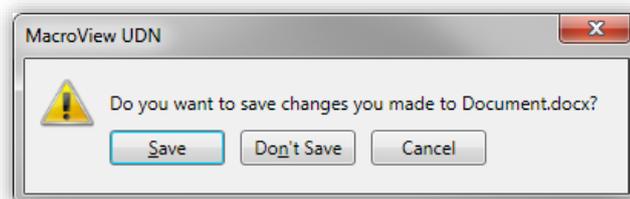


Figure 17. MacroView UDN Save on Close Dialog

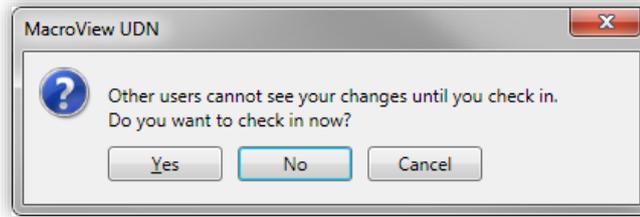


Figure 18. MacroView UDN Check In on Close Dialog

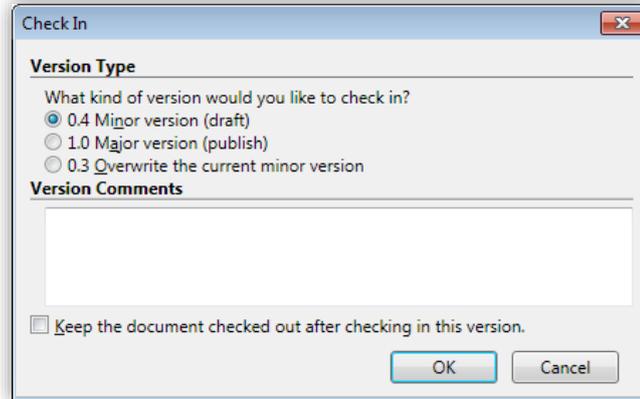


Figure 19. MacroView UDN Check In dialog

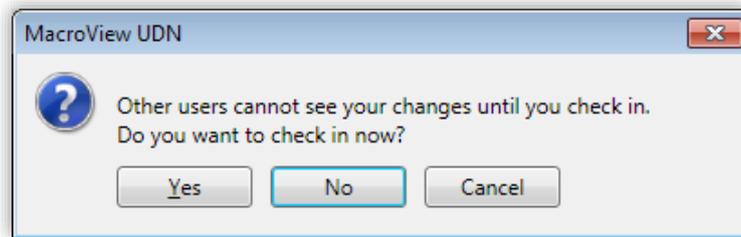


Figure 20. MacroView UDN Check In on Close Dialog

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 .

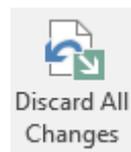


Figure 21. Discard All Changes Button in the ribbon

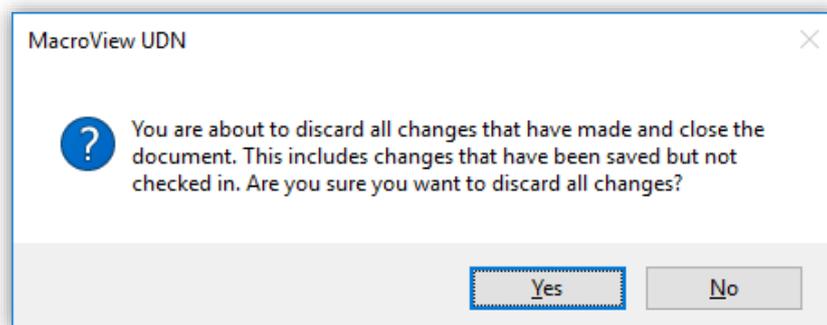


Figure 22. Warning message to indicate all changes will be lost

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 then 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.



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.

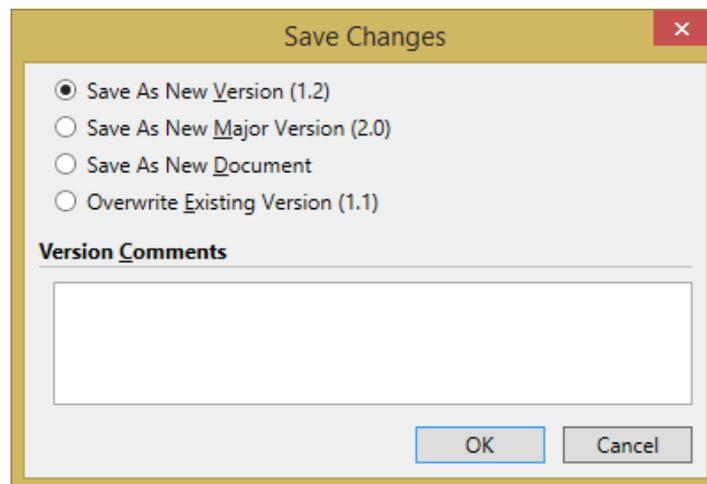


Figure 24. Save options when saving to a library with Minor Versions enabled

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 and Minors	1.5	Save As New Version (1.6)	1.6
		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.

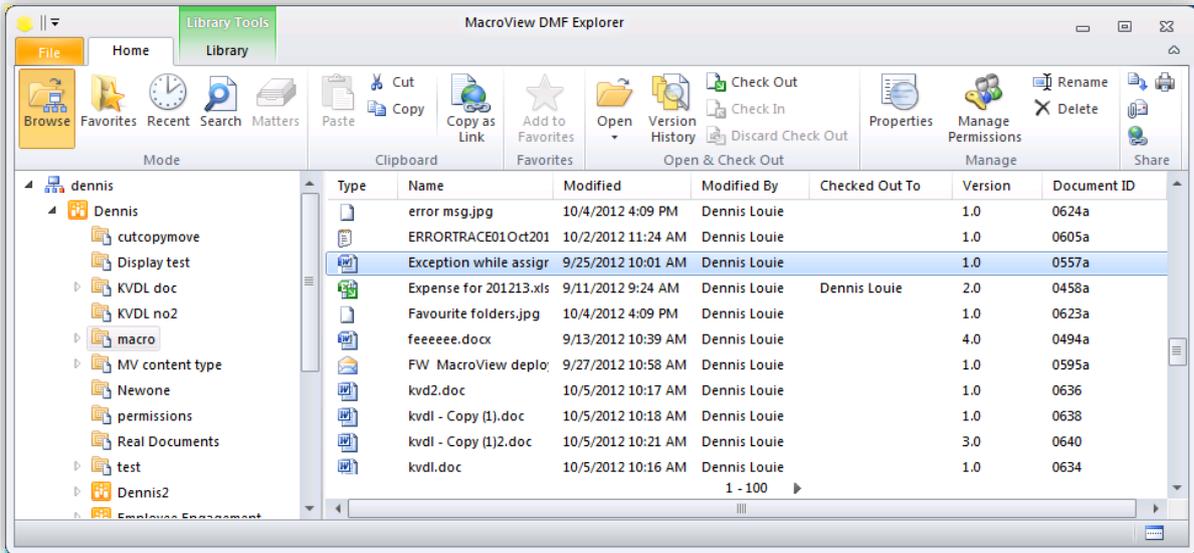


Figure 25. MacroView DMF Explorer with a Word document selected for opening – note version 1.0

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

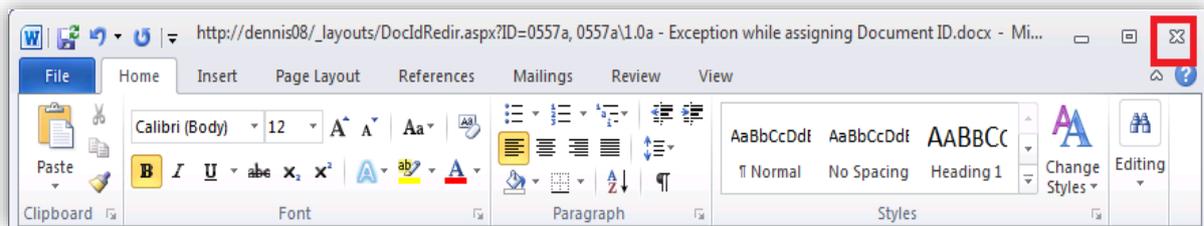


Figure 26. Main Word ribbon with Close button highlighted

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

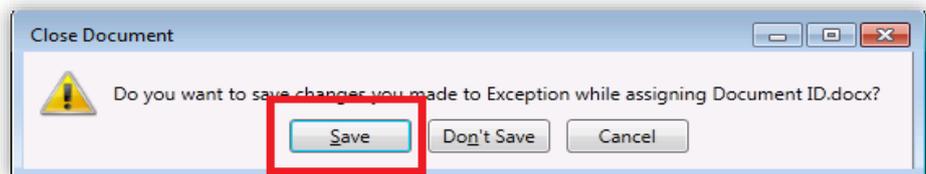


Figure 27. AOI Close Dialog

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

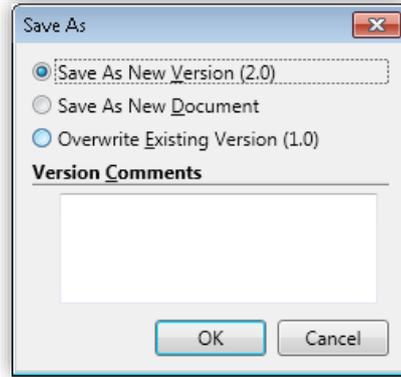


Figure 28. AOI *Save As* dialog with *Save As New Version* selected
Select *Save As New Version* and enter a New Version comment.
Version (2.0) describes the next proposed version of the document.

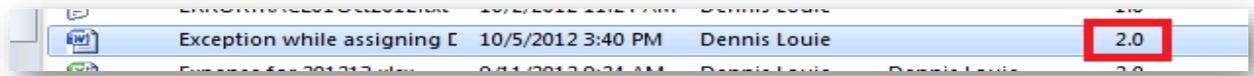


Figure 29. Version has been incremented

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.

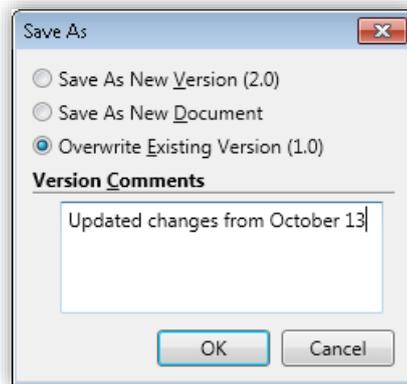


Figure 30. AOI *Save As* dialog with *Overwrite Existing Version* selected

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.

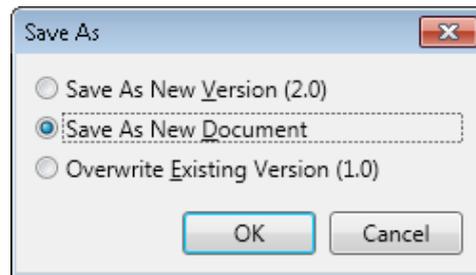


Figure 31. AOI Save As dialog with *Save As New Document* selected

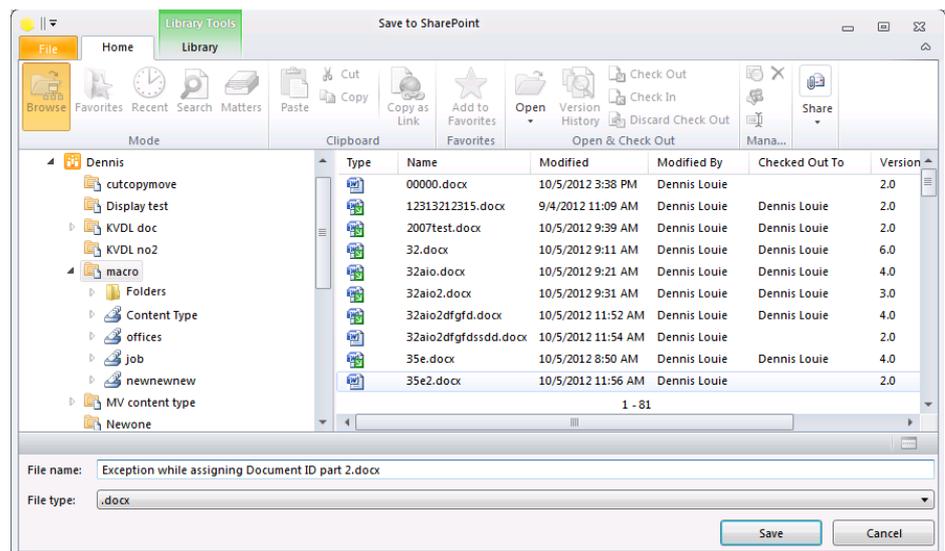


Figure 32. MacroView DMF *Save to SharePoint* dialog

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.

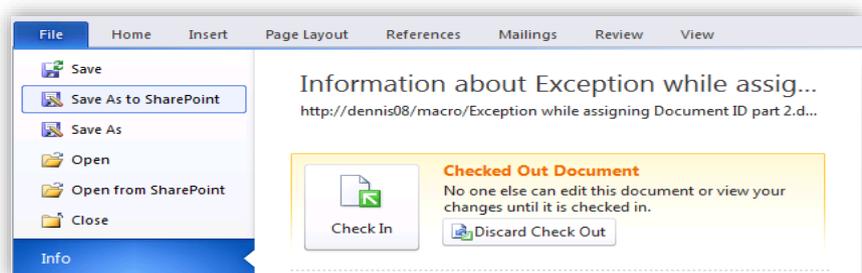


Figure 33. MacroView *Save As to SharePoint* button in the *File* tab of the Word ribbon

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.

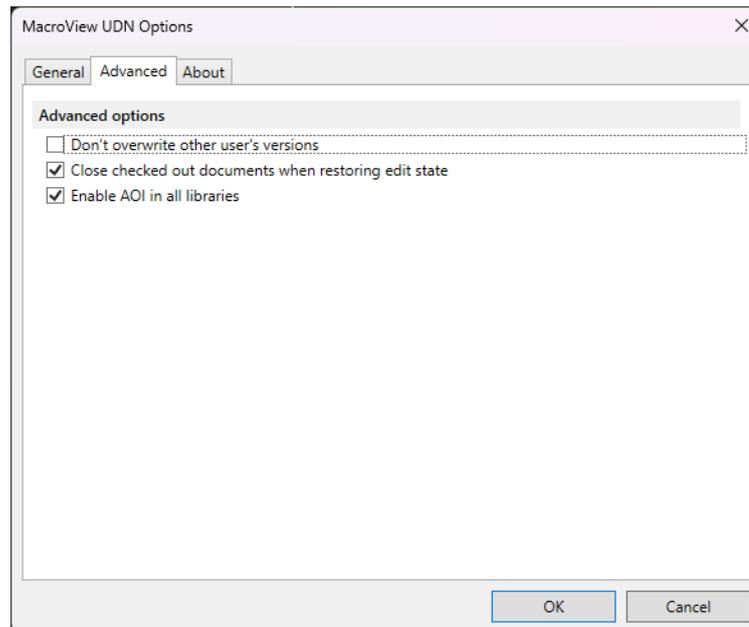


Figure 34. Advanced options (only available in Word when using AOI)

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.

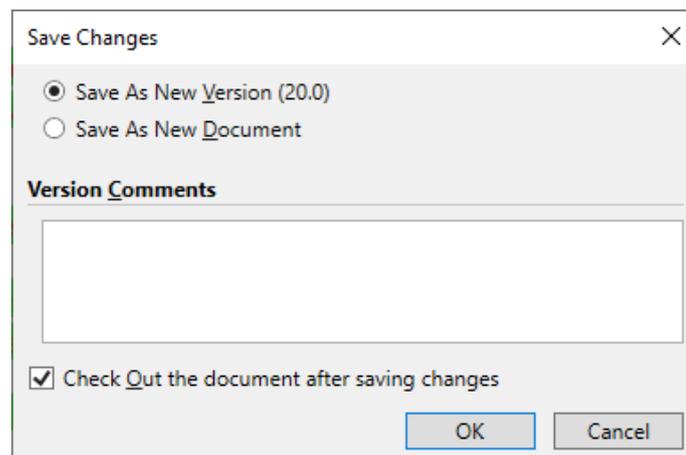


Figure 35. Take note of the Check-out setting

5.2.11 Close Document When Restoring Edit State

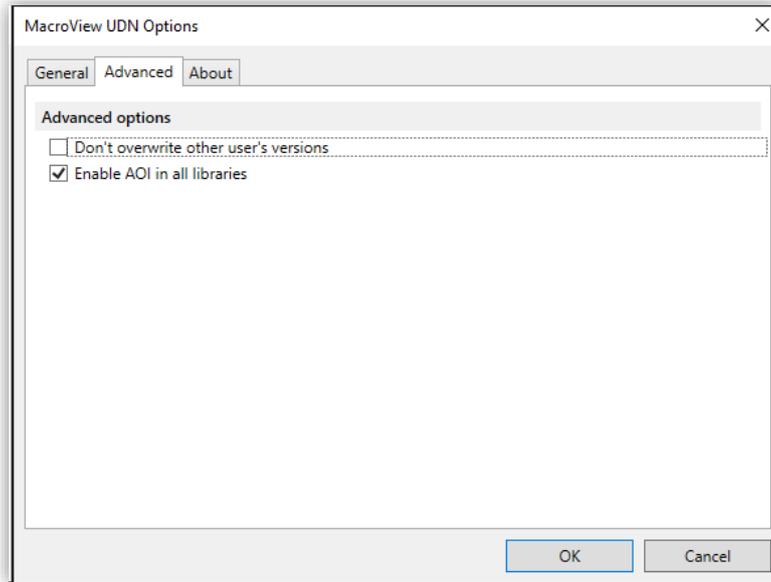
Added option to automatically close and reopen a checked-out document on saving

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



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

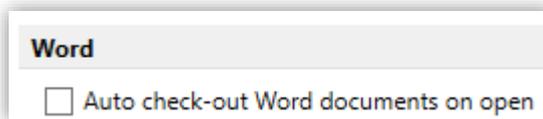
See [4.6](#) for more information.

5.2.14 Co-authoring support in AOI

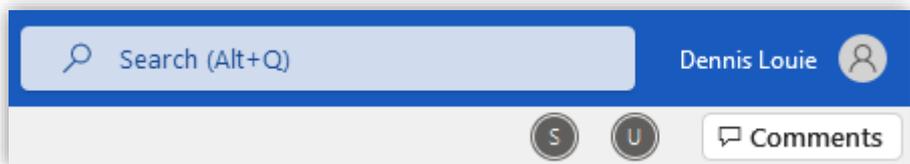
Multiple people are able collaborate on the same document at the same time.

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.

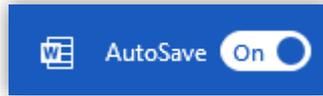


Each user can then open the same document and other users in the co-authoring session are displayed in the ribbon.



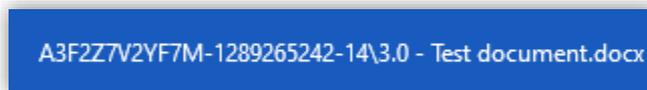
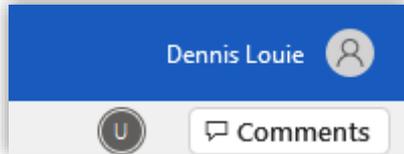
Documents opened using DMF allow native Word co-authoring functionality such as changes being tracked by the green highlights when each user presses the Word save button.

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



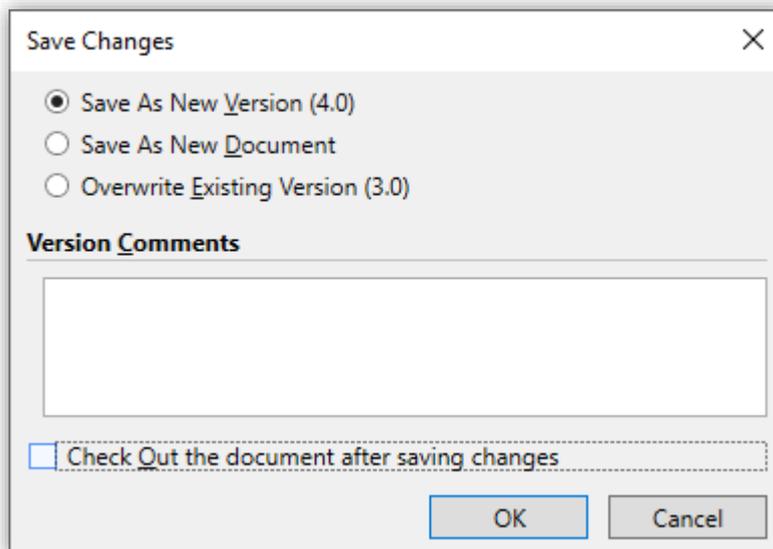
While co-authoring, each user's saves may cause additional versions to be created in SharePoint.

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.



Things to note

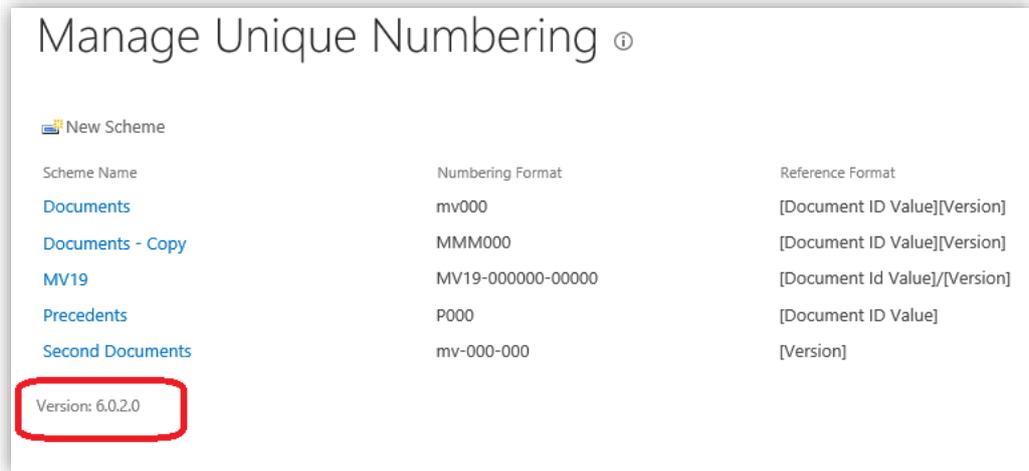
The AOI Save Changes functionality is disabled when there are multiple users co-authoring and clicking Save as to SharePoint invokes the standard DMF Save As behaviour.

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.



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.

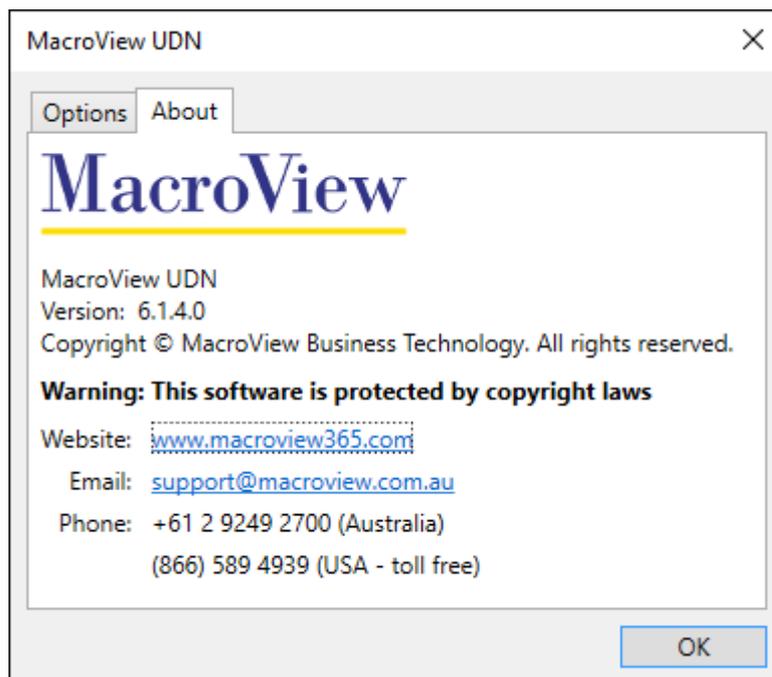


Figure 34. MacroView UDN About dialog

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_UDNServiceApplication
14\Template\Features\MacroView.SharePoint.UniqueNumbering.2010_Site
14\Template\Images\macroview.udn\DMFLogo32.png
14\Template\Images\macroview.udn\Feature.gif
14\Template\SQL\UDNServiceApplication\UDNServiceApplication.sql
14\WebClients\UDNServiceApplication\client.config
14\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 [SPRoundRobinServiceLoadBalancer](#) 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.

Server	SharePoint Products Installed	Role	Compliant	Services Running	Status	Remove Server
JTSP2016	Microsoft SharePoint Server 2016	Front-end with Distributed Cache	Yes	App Management Service Business Data Connectivity Service Central Administration Distributed Cache Machine Translation Service MacroView UDN Service Managed 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
JTSP2016A	Microsoft SharePoint Server 2016	Application with Search	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 Web Application Microsoft SharePoint Foundation Workflow Timer Service Search Host Controller Service Search Query 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	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 SPSRoundRobinServiceLoadBalancer 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](#)