

MacroView ClauseBank™ **Version 8.4**

User Guide

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Purpose of this document

This document describes the functionality and intended usage of **MacroView ClauseBank**. It is also a guide for Administrators responsible for the maintenance of **MacroView ClauseBank**.

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1 Introduction

MacroView ClauseBank makes it easy to publish, retrieve and insert frequently needed standard text and graphics into your Word documents, Outlook messages and PowerPoint presentations. Whether you generate sales proposals, financial plans, legal documents or general correspondence, ClauseBank makes Word, Outlook and PowerPoint more productive.

All organisations have standard text and graphics that are frequently required for inclusion in documents being generated. With **MacroView ClauseBank**, this material is published in a convenient central SharePoint website. This site can be accessed over any internet connection, which means that all staff, regardless of their location, can have convenient and immediate access to the latest standard material.

MacroView ClauseBank ensures that only up to date material is retrieved from this central SharePoint website. The automatic Expiry Alert feature of **MacroView ClauseBank** assists in maintaining the content so that it is up to date.

MacroView ClauseBank eliminates the time wasted in searching for material in previously generated documents and the risk of using an out-of-date copy.

Clauses can contain MacroView Precedent mark-up tags and can be used in conjunction with **MacroView Precedent**.

MacroView ClauseBank is the result of MacroView's extensive experience with the development of custom document automation solutions for some of Australia's leading banks, law firms and many other organisations. This is combined with leading technical skills in Microsoft Office, Microsoft SharePoint and SharePoint Online (O365).

2 Where does ClauseBank surface?

MacroView ClauseBank can be installed in Office 2010, 2013 and 2016.

If the **MacroView ClauseBank** facility has been installed, the **MacroView ClauseBank** tab is available on the Insert tab of the Ribbon in your Word, PowerPoint and Outlook environments. There is also a ClauseBank tab on the Home tab on the Ribbon.

Note: Before you can use ClauseBank you must first configure one or more ClauseBank servers. Refer to section 9.1.2 for information on adding, editing and removing content sources.

2.1 Word

MacroView ClauseBank adds a ClauseBank group to both the Home and Insert tabs on the Word Ribbon. On the Home tab the buttons include:

- *Insert Clause* – allows you to insert clauses at the current cursor position in the active document
- *Insert ClauseLink* – allows you to insert ClauseLinks at the current cursor position in the active document
- *New Clause* – allows you to create a new clause by selecting text in the current document
- *Expand* – replaces all ClauseLinks in the active document with the actual clauses
- *Options* - allows you to configure your ClauseBank.

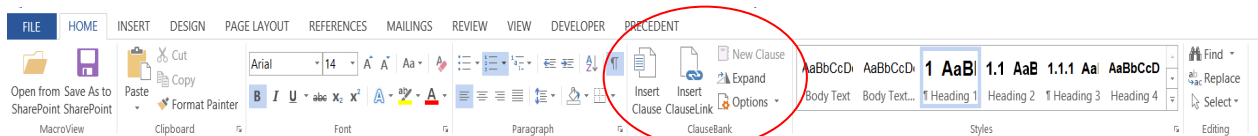


Figure 1: The MacroView ClauseBank button on the Home tab in Microsoft Word 2013

Only the *Clause* and *ClauseLink* buttons are available on the *Insert* tab.

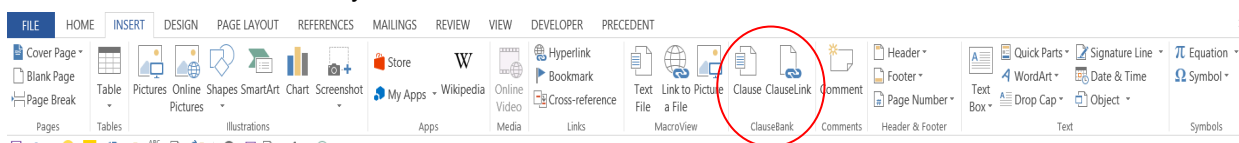


Figure 2: The MacroView ClauseBank buttons on the Insert tab in Microsoft Word 2013

If there is no document open in Word the following message will display if you click on the *Insert Clause*, *Insert ClauseLink* or *Expand* buttons.

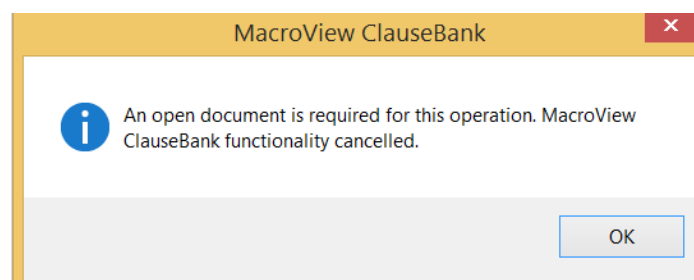


Figure 3: The MacroView ClauseBank message that displays when no document is open

The *New Clause* button is greyed out until you select text.

2.1.1 Inserting PowerPoint clauses in Word

When in Microsoft Word, you can insert Clauses/Slides created in Microsoft PowerPoint if the *Allow PowerPoint slides in Word* option is selected. The PowerPoint slide is inserted as an object. (Figure 4)

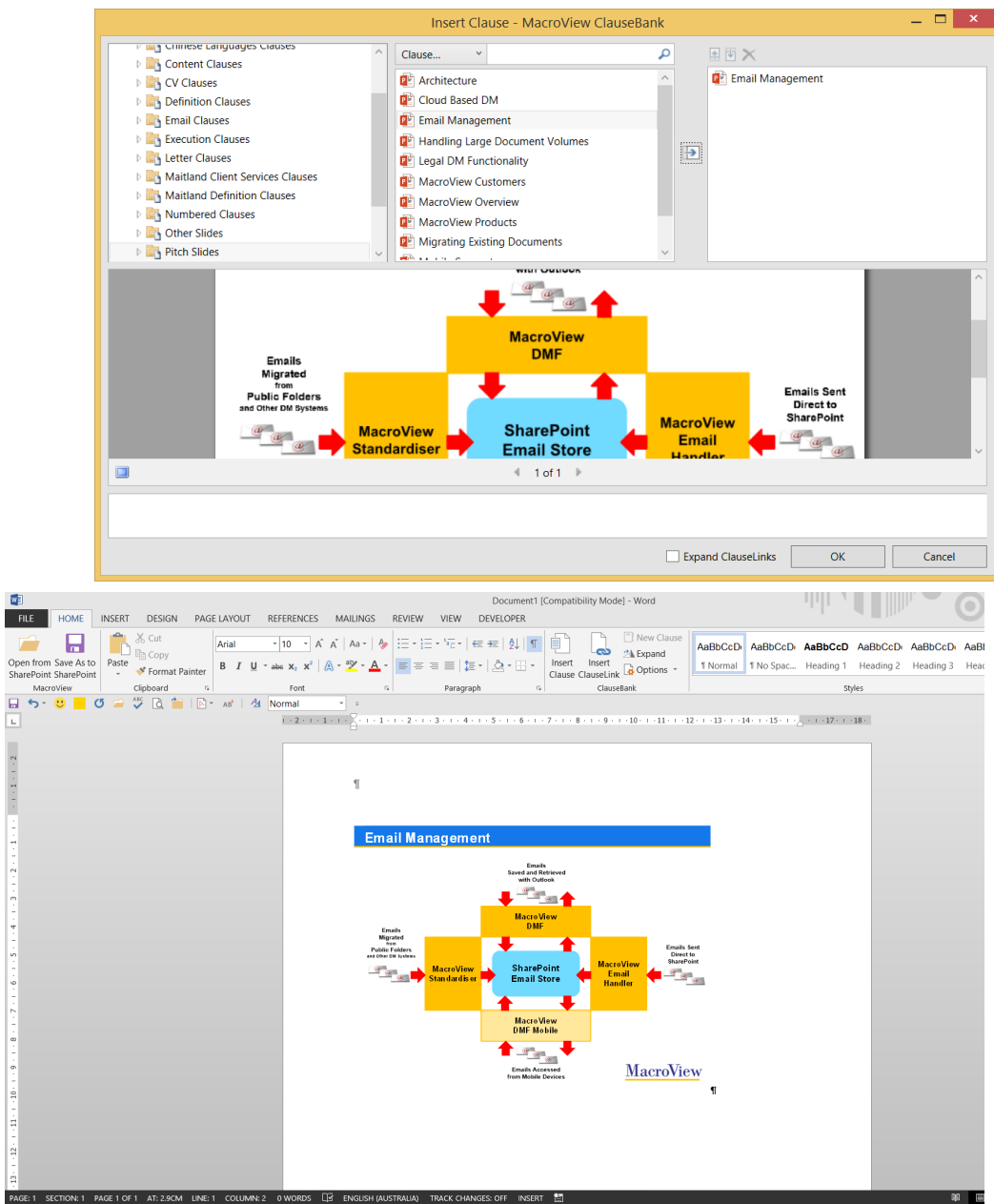


Figure 4: Inserting PowerPoint clauses into Word documents using ClauseBank

2.2 PowerPoint

MacroView ClauseBank adds a ClauseBank group to both the Home and Insert tabs on the PowerPoint Ribbon. On the Home tab the buttons include:

- **Insert Clause** – allows you to insert clauses at the current cursor position in the active presentation
- **New Clause** – allows you to create a new clause by selecting text and graphics in the current presentation
- **Options** - allows you to configure your ClauseBank.



Figure 5: The MacroView *Insert Clause*, *New Clause* and *Options* buttons on the Home tab in Microsoft PowerPoint 2013

Only the *Insert Clause* button is available on the *Insert* tab.

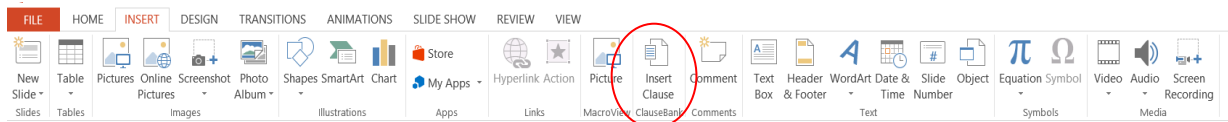


Figure 6: The MacroView *Insert Clause* button on the Insert tab in Microsoft PowerPoint 2013

If there is no presentation open in PowerPoint the following message will display if you click on the *Insert Clause* button.

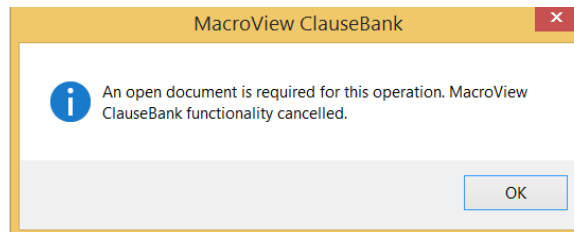


Figure 7: The MacroView ClauseBank message that displays when no presentation is open

2.2.1 Inserting Word clauses in PowerPoint

When in Microsoft PowerPoint, you can insert Clauses created in Microsoft Word if the *Allow Word clauses in PowerPoint* option is selected. The Word clause is inserted as an object. (Figure 8)

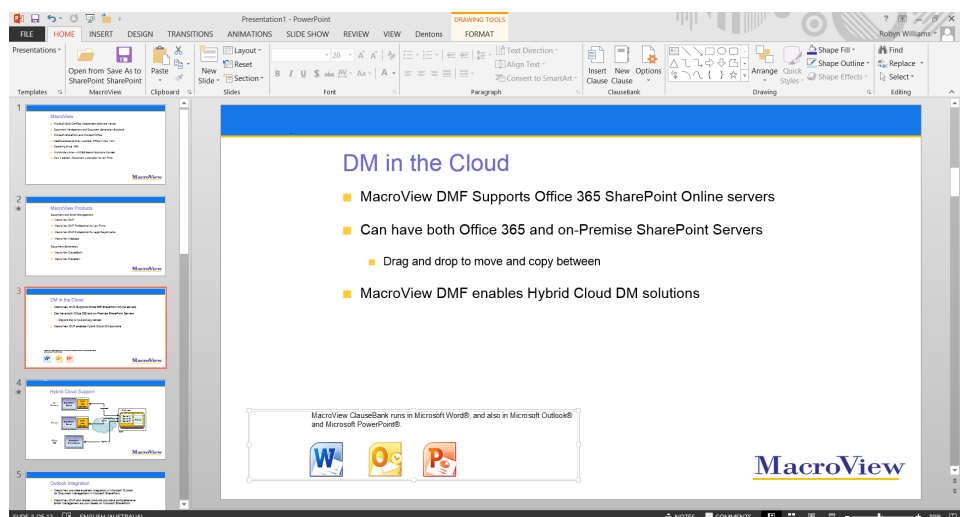
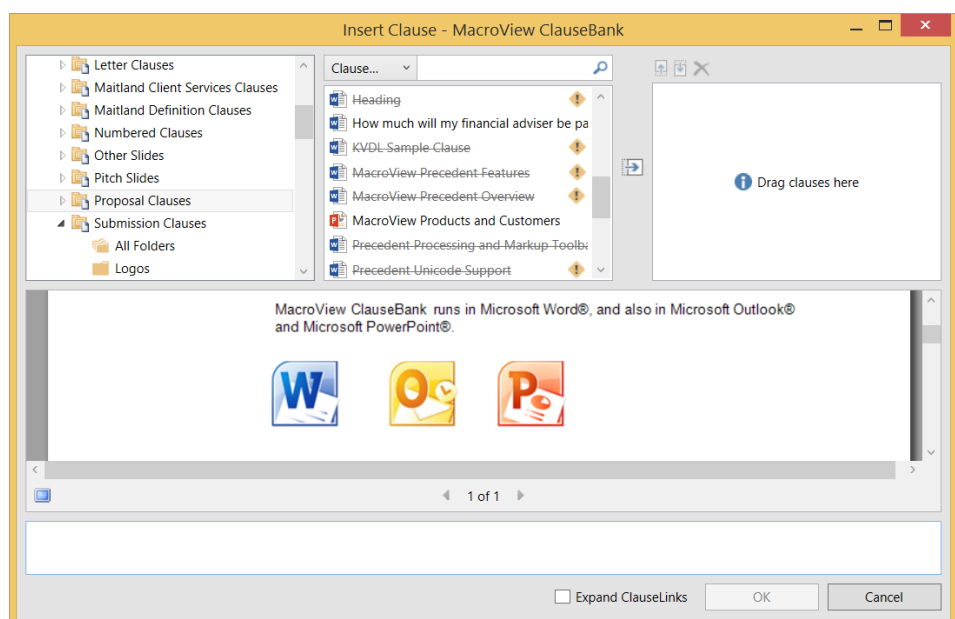


Figure 8: Inserting Word clauses into PowerPoint documents using ClauseBank

2.3 Outlook

MacroView ClauseBank adds a ClauseBank group to both the Message and Insert tabs on the Outlook Ribbon. On the Message tab the buttons include:

- **Insert Clause** – allows you to insert clauses at the current cursor position in the active email message
- **Options** - allows you to configure your ClauseBank.

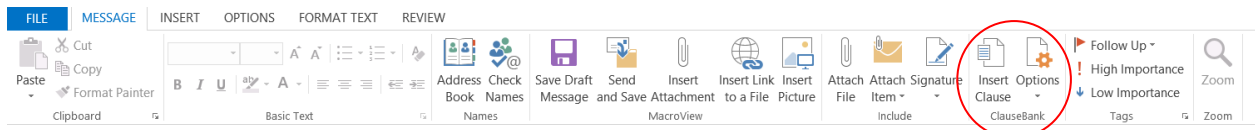


Figure 9: The MacroView *Insert Clause* and *Options* buttons on the Message tab in Microsoft Outlook 2013

Only the *Insert Clause* button is available on the *Insert* tab.

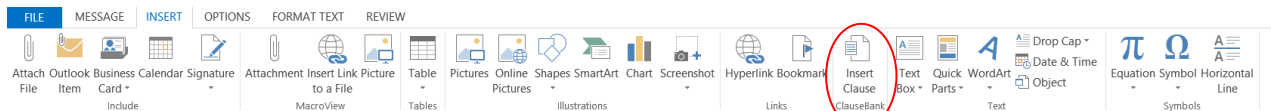


Figure 10: The MacroView *Insert Clause* button on the Insert tab in Microsoft Outlook 2013

3 Insert Clause



When you click on the button to insert a clause, the MacroView ClauseBank screen displays. This screen is populated by retrieving clauses from a central SharePoint site (the ClauseBank site). Clauses are organised into Libraries and within each library into Folders or by Category.

Using the MacroView ClauseBank screen, you can preview any clause and select either a single clause or a number of clauses for insertion into the current Word document, Outlook message or PowerPoint presentation.

MacroView ClauseBank automatically remembers your most recently selected ClauseBank Library the next time that you use MacroView ClauseBank.

3.1 Displaying ClauseBank Sites

The first time you use MacroView ClauseBank you will see a tree-view¹ of the ClauseBank sites that you have permission to access - potentially on multiple SharePoint servers and/or SharePoint Online (O365).

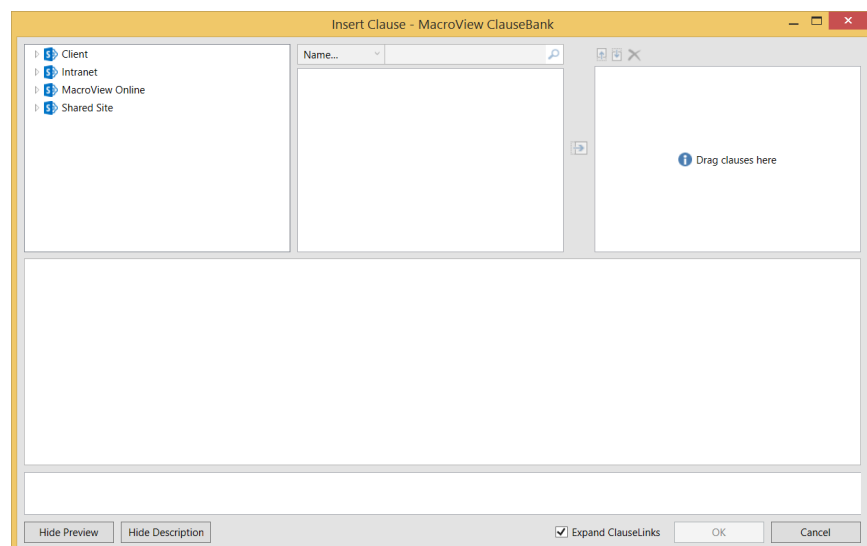


Figure 11: When you first use ClauseBank you see the tree-view of ClauseBanks available to you

Any site can be added as a ClauseBank. See Section 9.1.2 for details on adding ClauseBanks to your list.

¹ This was previously known as the Browse Tree-View mode. Note that the Details mode has been deprecated.

3.2 Displaying Libraries

The tree-view depicts the Clause Libraries available in each ClauseBank site.

Click the arrow to expand the ClauseBank site node. **MacroView** will then display the ClauseBank libraries that you have permission to access within that site.

By default only those document libraries whose names end in **Clauses** and **Slides**, will be displayed. Historically **Clauses** libraries contained Word documents and pictures that were only available for insertion in Word and Outlook while **Slides** libraries contained PowerPoint presentations and pictures that were only available for insertion in PowerPoint. This restriction no longer exists.

If the ClauseBank option *Display all Document Libraries* is checked all libraries (with the exception of those displayed in the exclusion list) will be displayed.

3.3 Displaying Folders and Categories²

The tree-view also depicts the Folders or Categories in each Clause Library. The advantage of using folders to categorise your clauses is that you can create up to 10 levels of subfolders. There is only one level for *Categories*.

By default, MacroView ClauseBank will provide navigation of the clause library by its folder and sub folder structure. If you wish to use categories to navigate the clause library a site column named *Categories* is required (refer to the MacroView ClauseBank Administration Guide).

Note that if you add a Folder to a library the *Categories* column will be ignored by the ClauseBank.

3.4 Clause List and Folders

If you are using *Folders* to categorise your clauses, **MacroView** will display the ClauseBank Folders within that library when you click the arrow sign to expand the ClauseBank library node. (Figure 14).

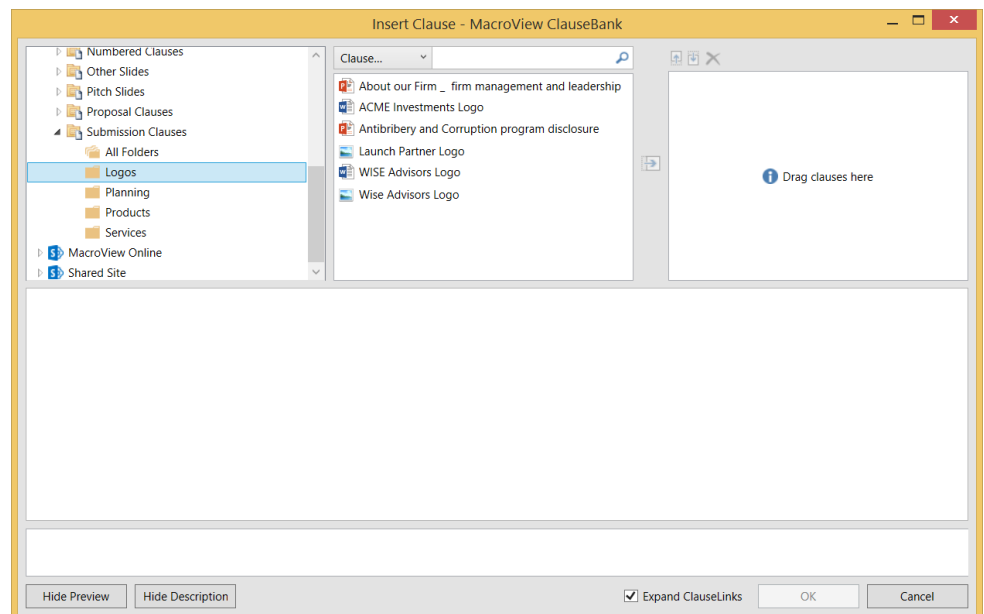


Figure 12: The relationship between Folders and Clauses list

When using navigation by Folder an **All Folders** option appears as the first 'Folder' for all libraries so that all clauses available in the library can be viewed in one list. The *All Folders* node can be disabled under settings.

If you click on a particular Folder only the clauses in that Folder will display in the clause list (Figure 15).

² Folders, Categories and clauses appear in alphabetical order.

3.5 Clause List and Categories

If you are using *Categories* to categorise your clauses, all clauses in that library appear in the Clauses list when you click the arrow to expand the ClauseBank Library node the library is highlighted causing. (Figure 13)

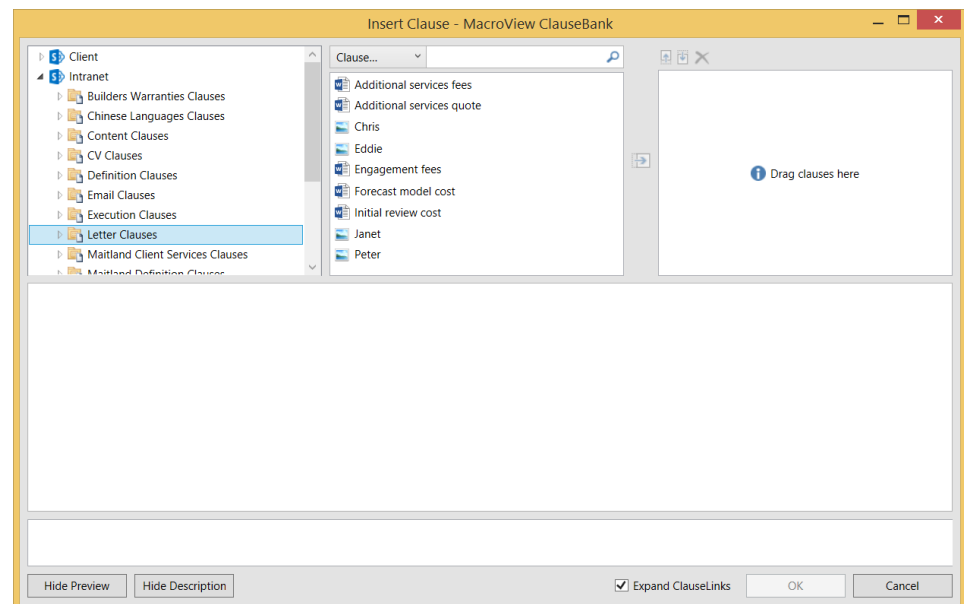


Figure 13: Clauses in 'Letter Clauses' library

If you are using *Categories* to categorise your clauses, **MacroView** will display the ClauseBank categories within that library when you click the arrow sign to expand the ClauseBank library node. (Figure 14).

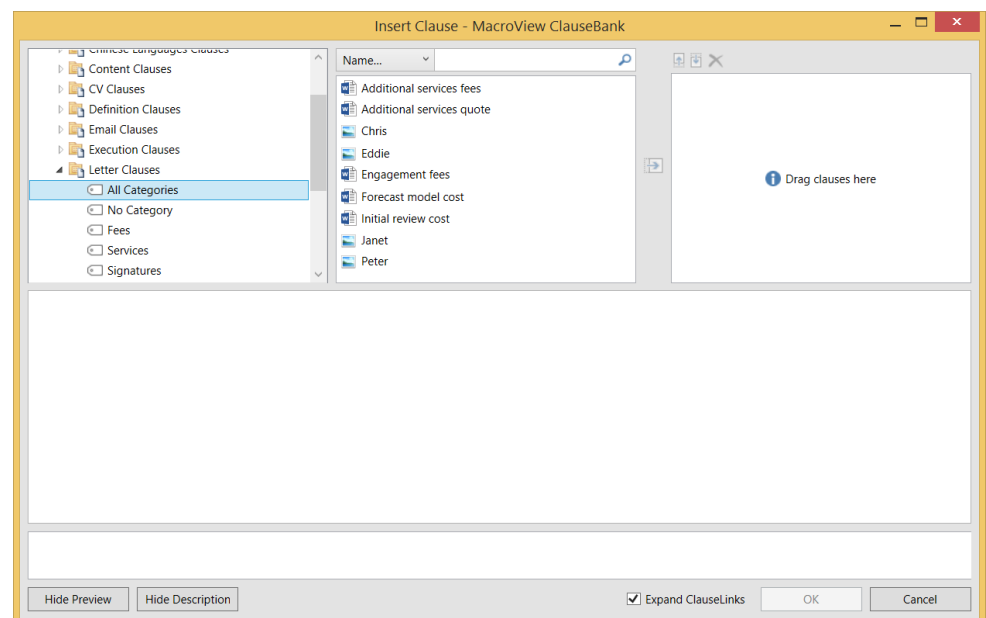


Figure 14: Categories in 'Letter Clauses' library

When using navigation by category an **All Categories** option appears as the first category for all libraries so that all clauses available in the library can be viewed in one list. The *All Categories* node can be disabled under settings.

The 'No Category' option appears if the Option Display 'No Category' category is ticked. Any clauses that have not been categorised will appear in the Clause List when this option is selected.

If you click on a particular category only the clauses in that category will display in the clause list (Figure 15).

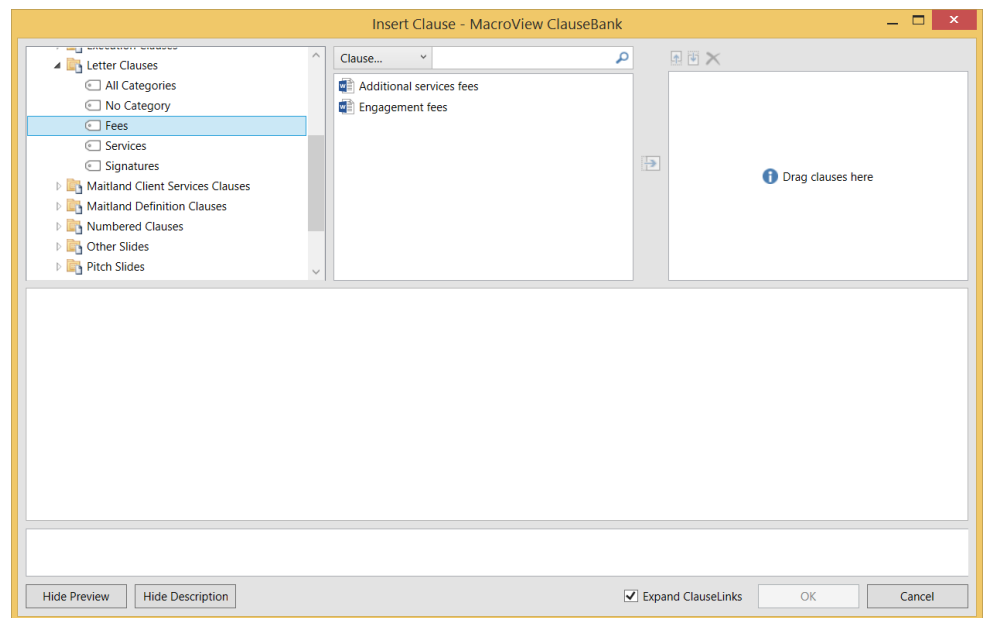


Figure 15: A selected category with clauses displayed.

When you click on a Category, the valid clauses in that Category are displayed in the Clauses list. Valid clauses are those clauses that have not exceeded their Expiry Date.

If there are no valid clauses for a particular Category and the option to Display Expired Clauses is not selected then the Category will appear in the list and will display **No clauses to display** in the clauses list.

If there are no valid clauses for any category the **All Categories** will display **No clauses found...** in the clauses list (Figure 16).

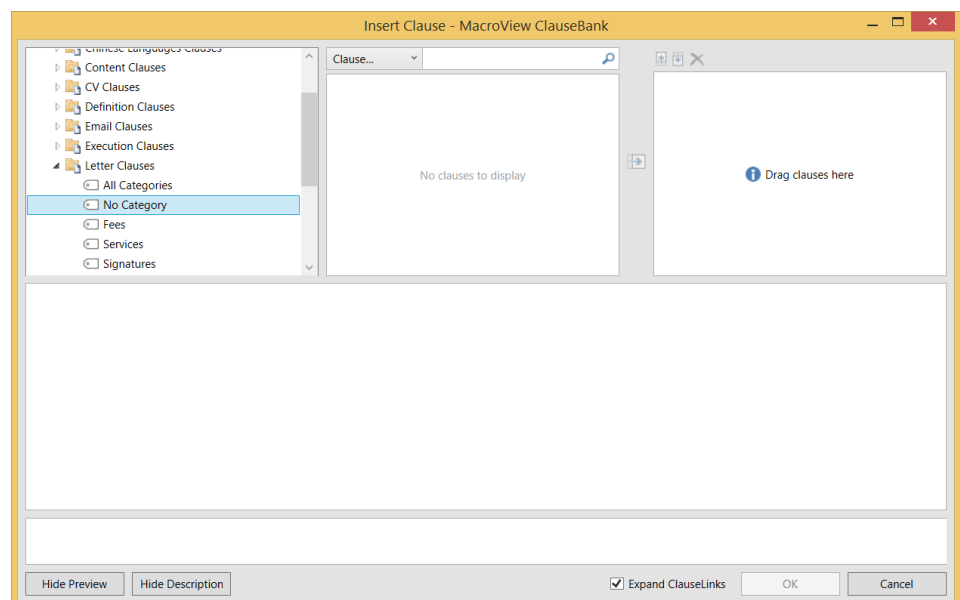


Figure 16: The relationship between Categories and Clauses list

If there are no clauses created for a particular Category then that Category will not appear in the list.

3.6 Previewing a Clause

You can preview clauses before selecting them to check that you are selecting the appropriate clause by using the Preview Pane or the Preview Window.

Note that clicking a hyperlink contained in the preview text will not work if the selected clause is stored in the Clause Library as a Word document.

3.6.1 Preview Pane

When you click on a clause in the Clause list, the Preview pane shows a fully-formatted display of the currently selected clause (Figure 17). Clicking on the **Show Preview / Hide Preview** toggles the pane open and closed.

Note: ClauseBank does not ship with the **Show Preview / Hide Preview** toggle button visible. The *Display view toggle buttons* in Options, ClauseBank Options, General needs to be ticked.

If the Options, ClauseBank Options, Advanced, *Display preview* is not ticked ClauseBank will always start with the Preview pane closed.

If the clause is longer than a page click the left and right arrows at the bottom of the Preview pane to page through the clause.



Prev / Next page buttons

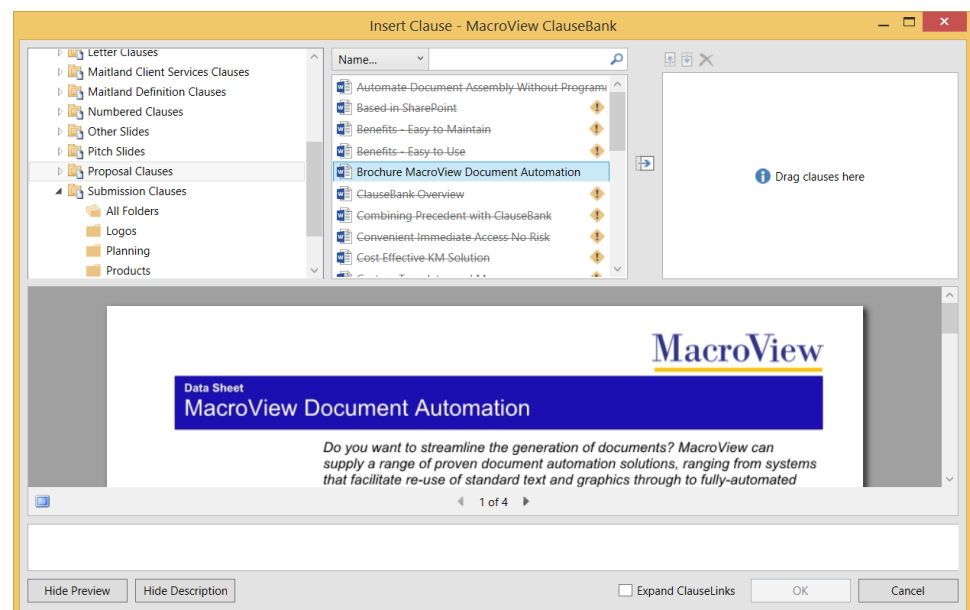


Figure 17: Multi-page clause displayed in Preview pane

3.6.2 Full-screen preview window



Preview Clause button

Clicking the **Full Screen Preview** button will cause the preview to be displayed in a full screen window (Figure 18). This is useful for reading through longer clauses.

If the *Use full screen XPS previews* option in Options, ClauseBank Options, Advance is ticked you will also be able to select and copy text from clauses in the full screen preview window.

Note: ClauseBank does not ship with **Full Screen Preview** button visible. Toggle *Allow full screen preview* in Options, ClauseBank Options, General.

If the clause is longer than a page click the left and right arrows at the bottom of the Preview window to page through the clause.



Prev /Next page buttons

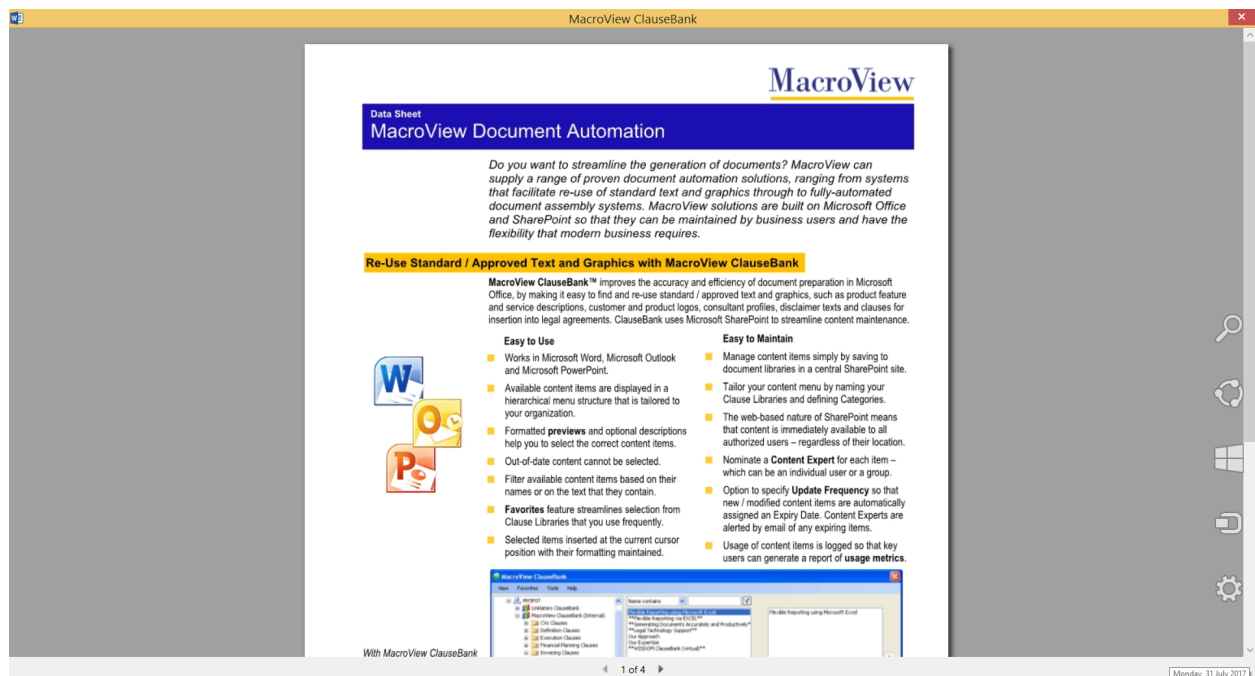


Figure 18: Multi-page clause displayed in Preview window

Clicking the **Close** cross at the top right of the window will close the **Preview Clause** window (Figure 18).

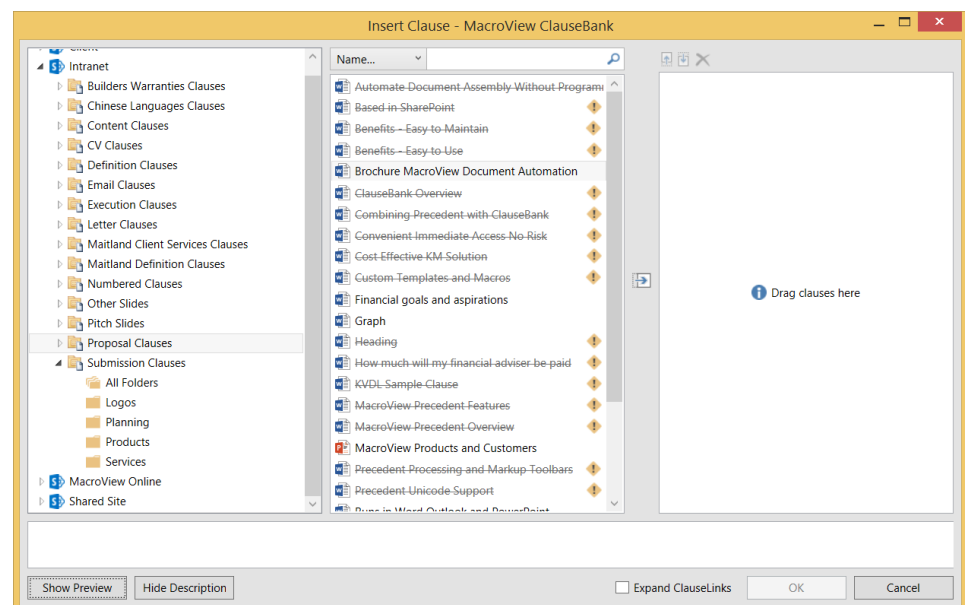


Figure 19: MacroView ClauseBank with Preview pane closed

3.7 Displaying the Clause Description

When you click on a clause in the Clause list the **Description** pane displays any description text that has been created with the clause. This text is useful in assisting you to know when to use this particular clause. It can include hyperlinks to websites to provide extra information and email addresses.

Clicking on the **Show Description / Hide Description** toggles the pane open and closed (Figure 20).

Note: ClauseBank does not ship with the **Show Description / Hide Description** toggle button visible. The *Display view toggle buttons* in Options, ClauseBank Options, General needs to be ticked.

If the Options, ClauseBank Options, Advanced, *Display description* is not ticked ClauseBank will always start with the Description pane closed.

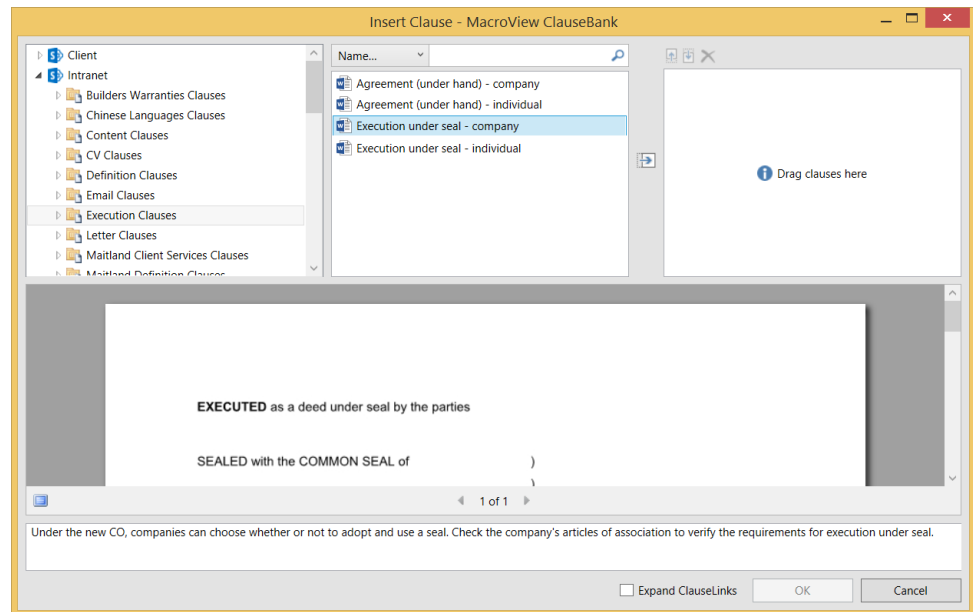


Figure 20: Single-page clause displayed in Preview pane with description

3.8 Searching for Clauses in the Clauses List

To restrict the list of clauses in the **Clauses** list, type text in the search box and then click the search button. You can filter clauses based on text found within the name of the clause or by text found in the content of the clause.

3.8.1 Filter by 'Name contains'

By default, the search type is **Name contains**. Type part of the clause name in the filter box that appears above the list.

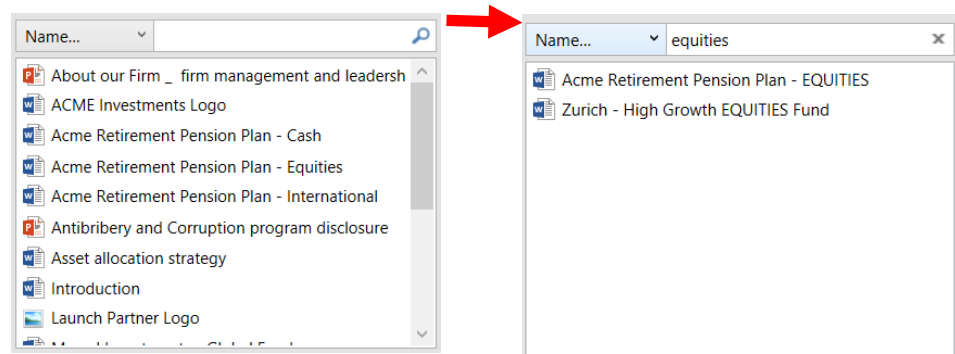


Figure 21: Only those Clauses whose names contain the characters 'equities' are listed

ClauseBank will automatically restrict the list of Clauses to be only those whose names contain the characters that appear in the filter box.


To clear the filter, click the **Clear Search** button or clear the search text.

If the **Capitalise filter argument** setting is ticked, ClauseBank will display the filter characters in UPPER CASE within the names of the clauses in the Clauses list. See Section 9.1.1 for more detail about this setting.

Note: The Filter by 'Name Contains' is not available at the site level. See 3.8.3 Advanced Search options below for more functionality.

3.8.2 Filter by 'Clause contains'

Although this is referred to as a filter it actually uses the SharePoint Search. The SharePoint Search must be configured and a crawl run before a search will be successful.


Clear sort button

Note that the **Filter by Clause contains** option is available if using Microsoft SharePoint Server 2010, SharePoint Foundation 2013, SharePoint Server 2013, SharePoint Server 2016 or SharePoint Online (Office 365).

Select the filter type **Clause contains**. Type the text that you want to search for in the contents of the clause in the search box that appears above the list. The search is dynamic and completes when you stop typing (Figure 22).

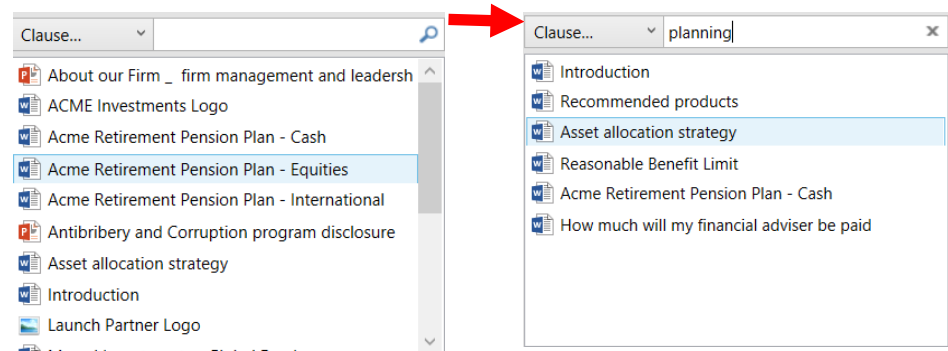


Figure 22 Only those clauses that contain 'planning' in their body are listed

ClauseBank will automatically restrict the list of Clauses to be only those whose content contains the characters that appear in the search box.

To clear the filter, click the **Clear Search** button.

The Filter by '*Clause Contains*' is available at the site level if you tick the Option, Enable clause search on sites.

3.8.3 Advanced Search options

If you tick the Option, Advanced setting *Display advanced search options* you will be provided with the following dropdown list of filter options instead of the *Name contains* or *Clause contains* options.

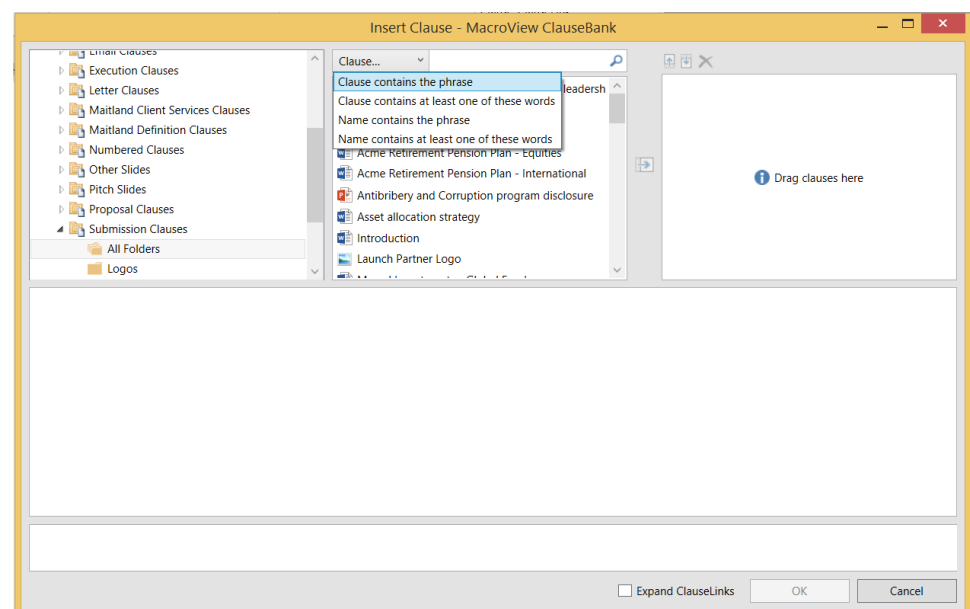
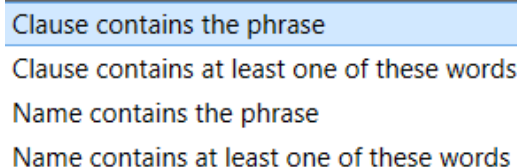


Figure 23 Advanced search options

Phrases may only contain whole words. In the example below if the 's' is left off 'fees' no items are returned. (Figure 24).

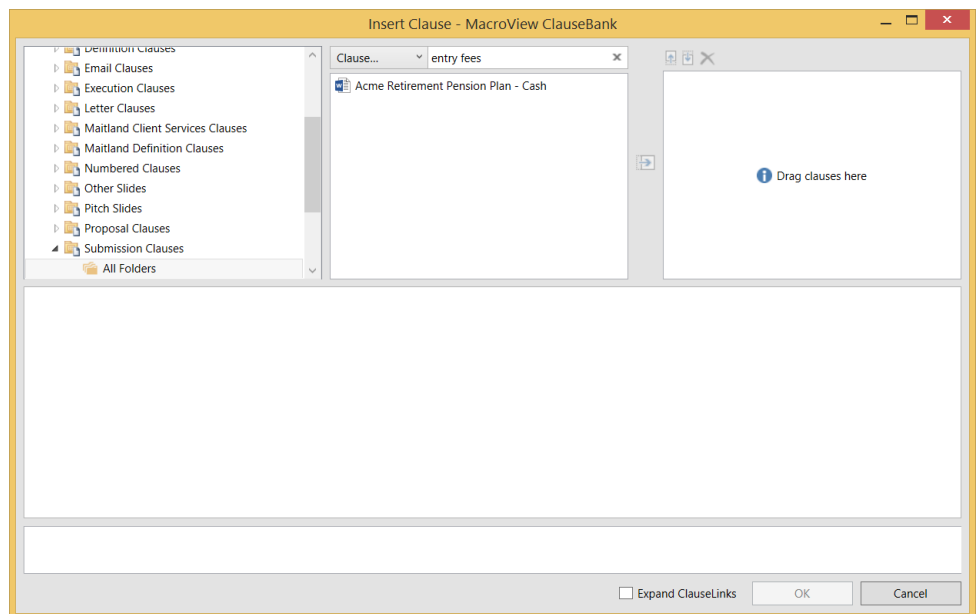


Figure 24 Advanced search for the phrase 'entry fees'

If you are searching for *Clause that contains at least one of these words* then you enter the individual whole words separated by a space. The example below shows the clauses that contain the words 'securities' and/or investment'. (Figure 24).

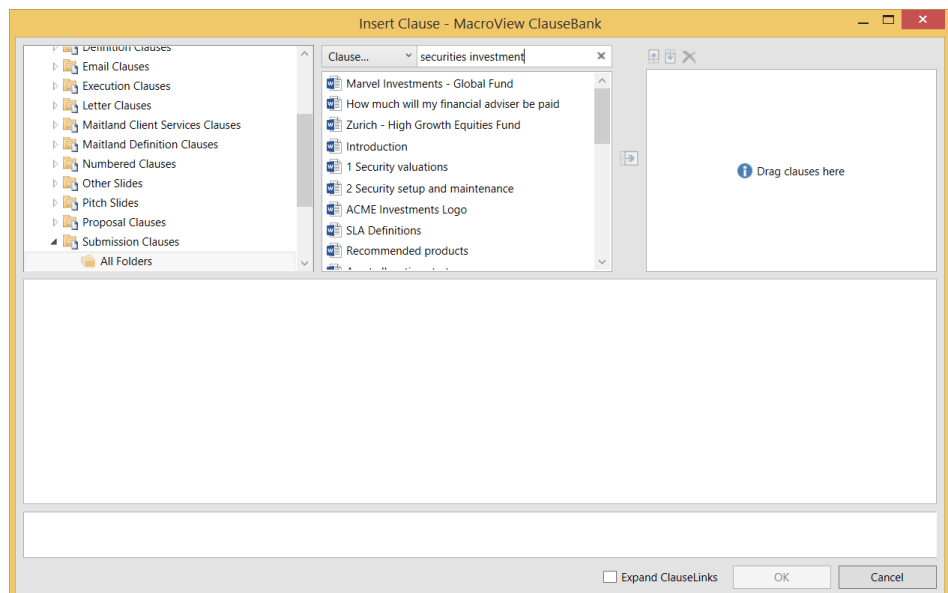


Figure 25 Advanced search for the words 'securities' and/or investment'

The results returned rely on the configuration of your SharePoint search³.

3.9 Selecting Clauses to Insert

You can select the clauses and move them into the **Selected Clauses** list. You can choose a combination of clauses from various libraries and categories if you so desire. To move clauses into the **Selected Clauses** list you can:



Move button

- drag and drop the clauses
- double click on the clauses
- click the move button
- right click and choose *Add to Selected Clauses* (Figure 25).

³ Expired content will be returned by the advanced search.

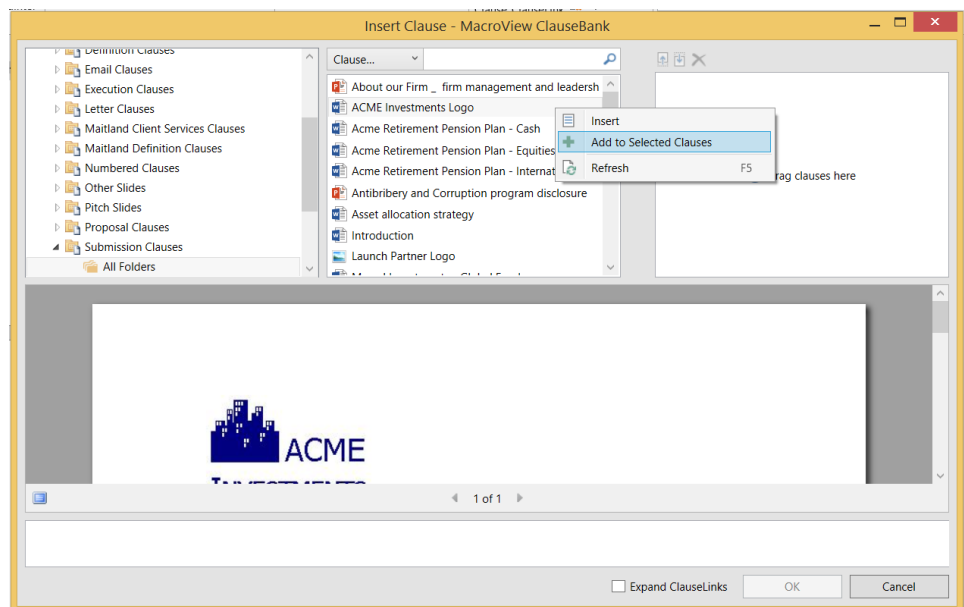


Figure 26: Insert clauses using *Add to Selected Clauses*

If *Allow duplicate clauses* is ticked in Options, General tab, you will be able to select and move each clause into the **Selected Clauses** list multiple times. (Figure 27).

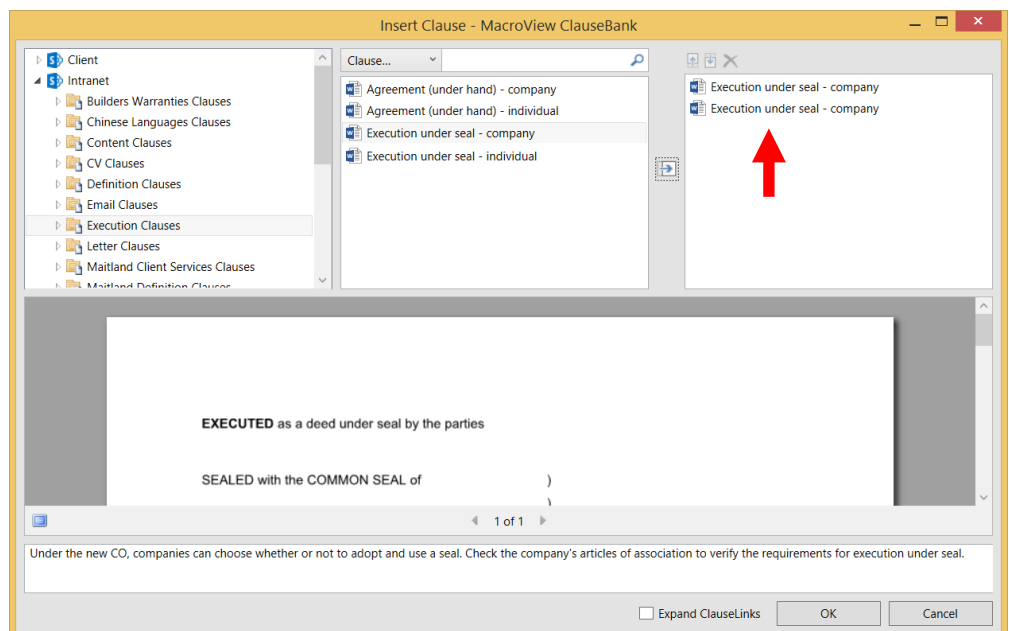


Figure 27: Multiple copies of the clauses can be selected.

3.10 De-Selecting Clauses



Remove clause
button

To remove a clause from the **Selected Clauses** list, click to select the clause in your **Selected Clauses** list then click the **Remove Clause** button (Figure 28 and Figure 29).

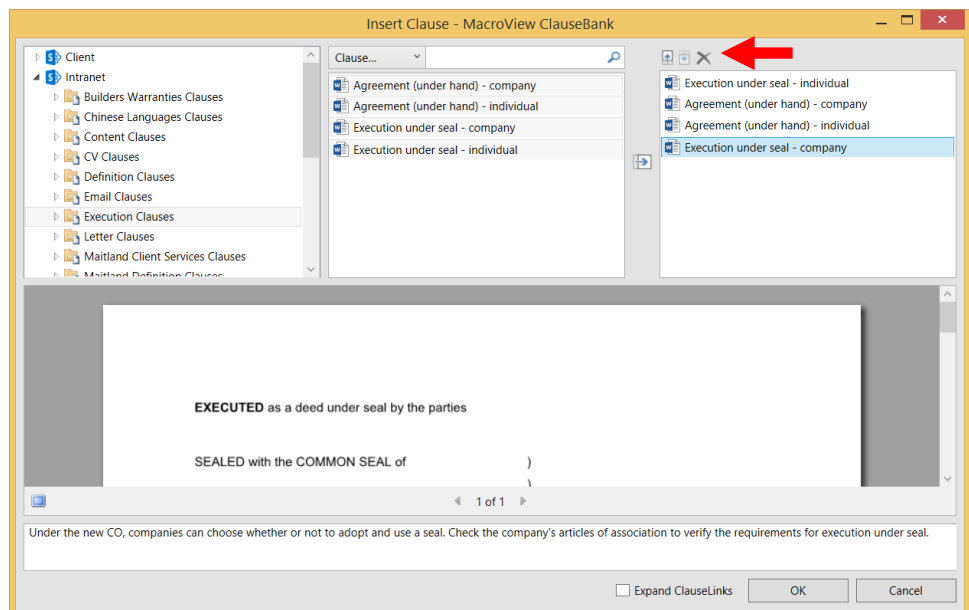


Figure 28: Before clicking the Remove Clause button.

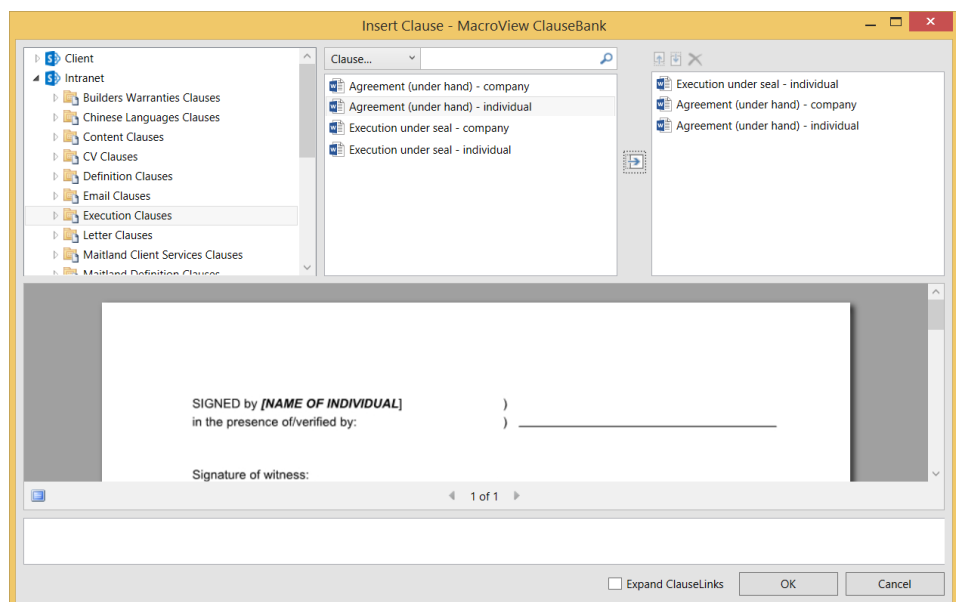


Figure 29: After clicking the Remove Clause button the clause no longer appears in the **Selected Clauses** list.

3.11 Changing the Order in which Clauses will be Inserted



Move clause up
Move clause down
buttons

Clauses will be inserted into your document in the order in which they appear in the **Selected Clauses** list. To change the order of clauses in the **Selected Clauses** list you can drag and drop the clauses to move them up and down the list or click on a clause in that list and click the **Move clause up** or **Move clause down** buttons until the clauses are in the order that you require (Figure 30).

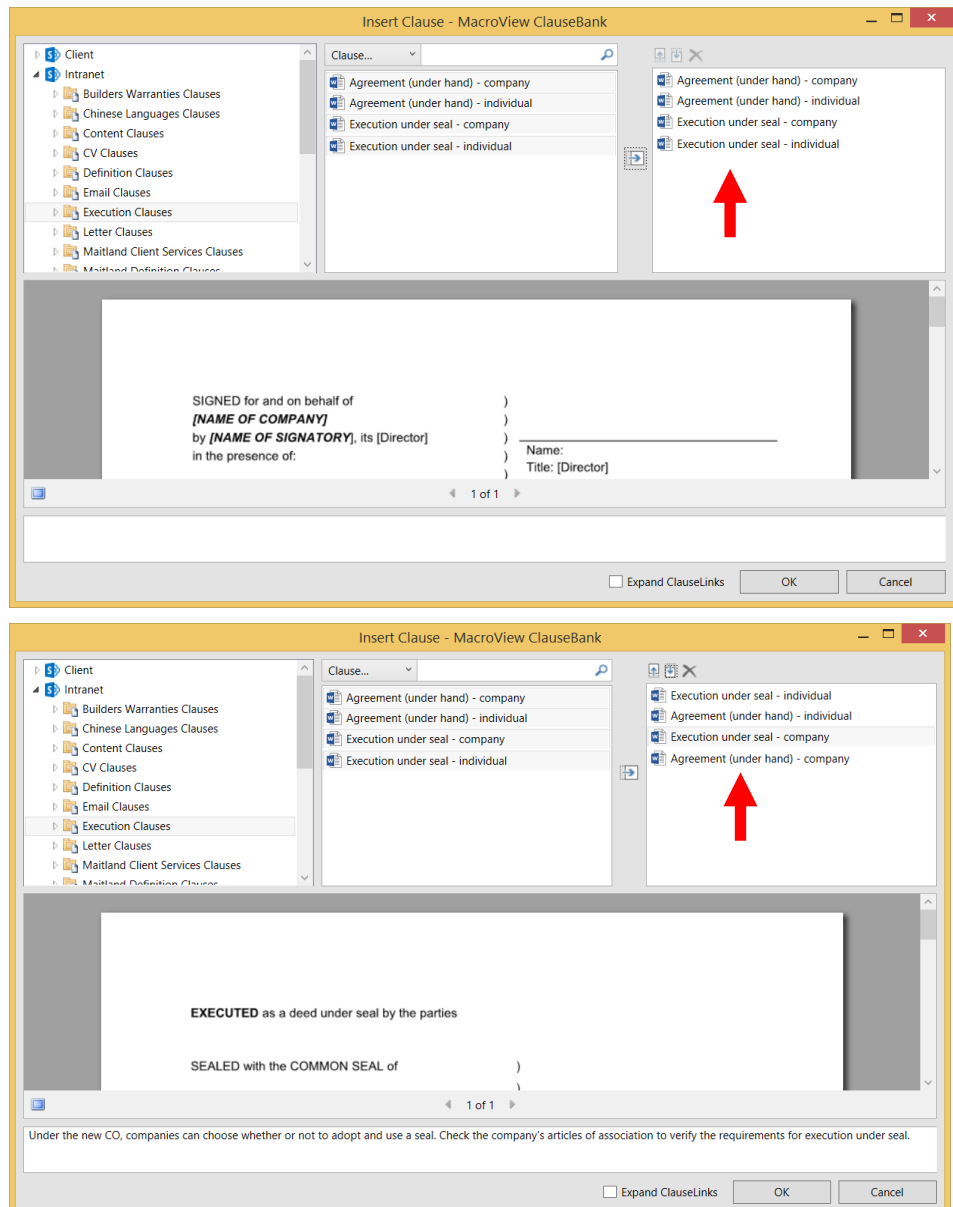


Figure 30: Adjusting the ordering of your **Selected Clauses** list

3.12 Inserting Clauses

When you have selected and ordered the clauses that you want to insert, click the **OK** button (Figure 31).

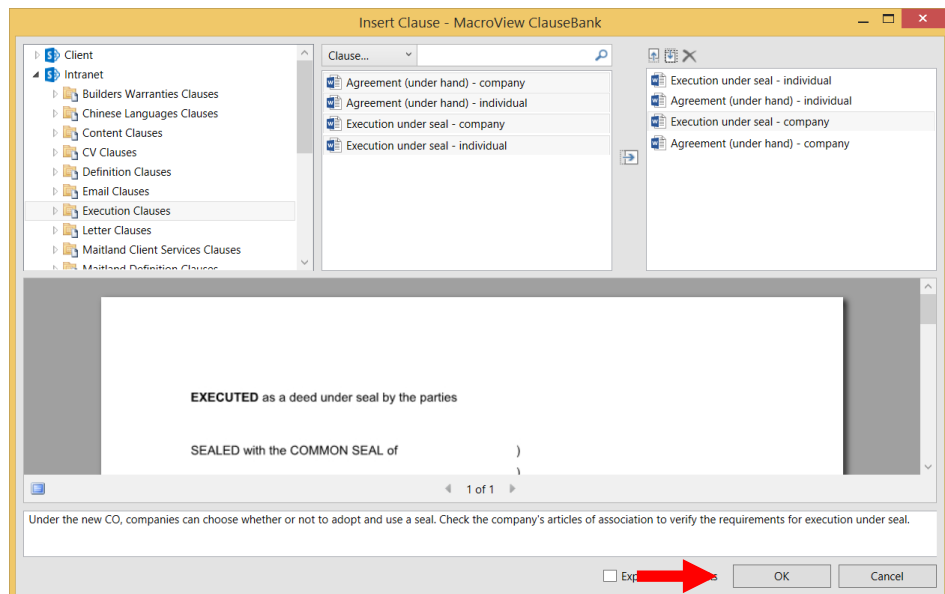


Figure 31: Clicking the **OK** button will insert selected clauses into your document.

3.12.1 Right-click Insert

Alternatively if you tick the Option, *Advanced setting Allow clause to insert on right click* you can select the clauses in the clause list, then right click, choose **Insert** to have them placed in the current document without moving them into the selected clauses panel.

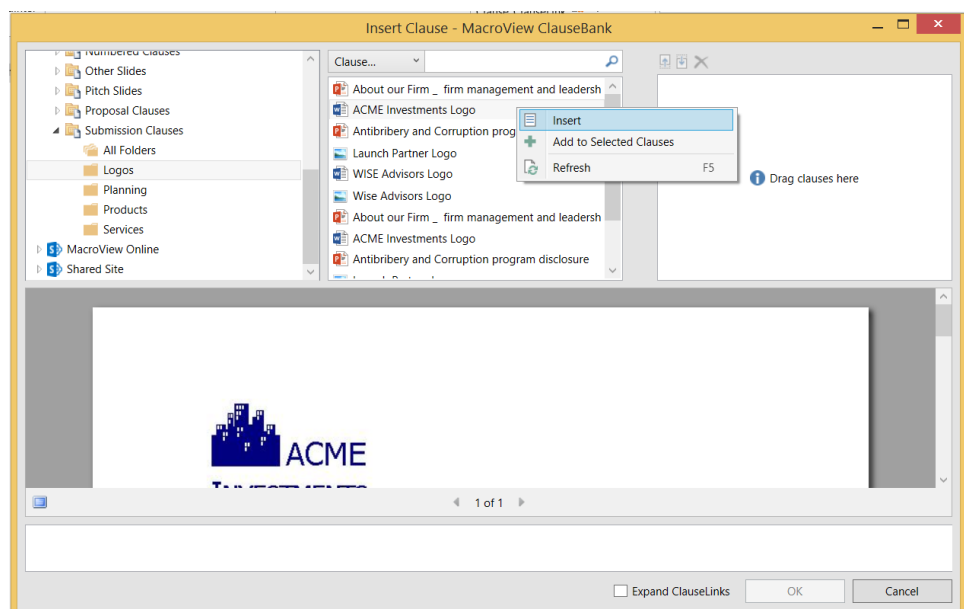


Figure 32: Right click, **Insert** will insert selected clauses into your document.

4 Insert ClauseLink



When you click on the **Insert ClauseLink** button, the **MacroView ClauseBank** screen displays. The functionality of this screen is as described in section 3 above. When you click **OK**, instead of inserting the clauses in the **clause list**, links to each of the clauses are inserted in the document (Figure 33).

"Business Day" means a day, other than a Saturday or Sunday, on which banks are open in Hong Kong to the general public for business;

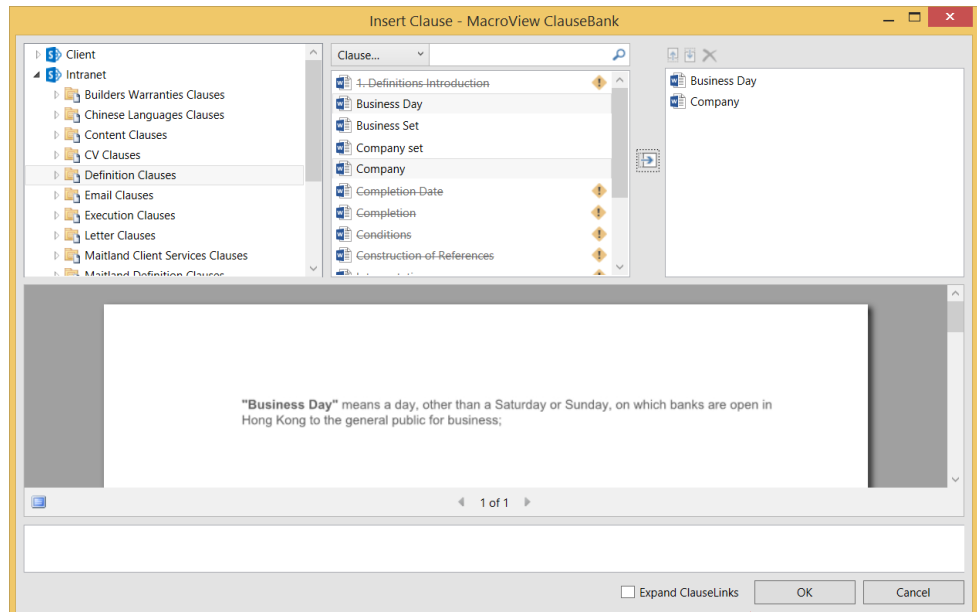


Figure 33: Inserted ClauseLinks

[Clause Link: Business Day](#)

[Clause Link: Company](#)

The advantage of inserting ClauseLinks in certain documents rather than inserting actual clauses is that the clauses can be expanded when the document is being prepared for issue guaranteeing that the latest version of the clause is included. This is important for clauses that may update regularly with legal or fee information for instance.

You can also include ClauseLinks within other clauses.

Note that ClauseLinks are only available in Microsoft Word.

5 Expanding ClauseLinks

There are two ways to expand ClauseLinks – the *Expand ClauseLinks* tick box on the Insert Clause dialog or using the *Expand* button on the ribbon.

5.1 *Expand ClauseLinks* tick box

If a clause contains ClauseLinks the ClauseLinks will not expand when you insert the clause unless you tick the *Expand ClauseLinks* box. If you tick this box the ClauseLinks within the clause are expanded immediately after the clause is inserted. (Figure 34).

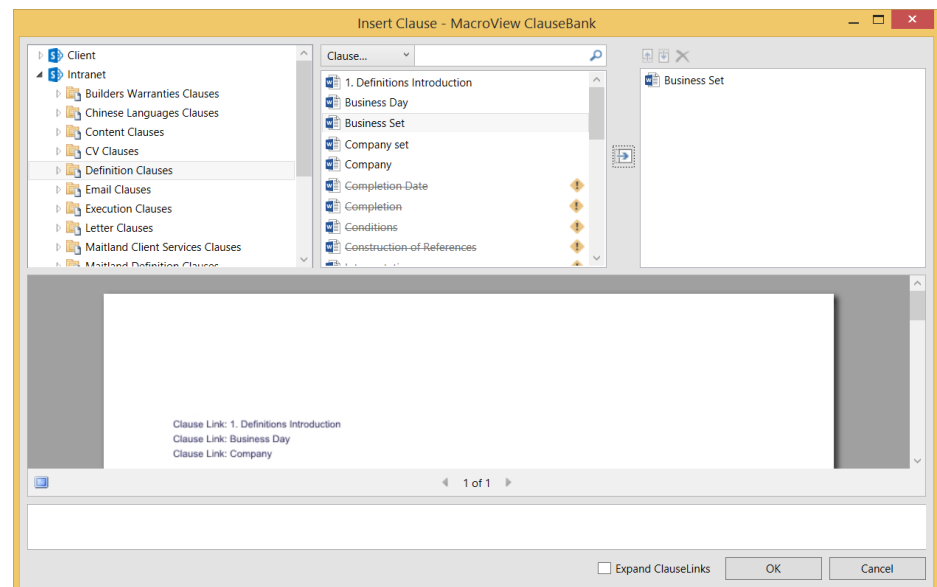


Figure 34: Inserted ClauseLinks

THE PARTIES AGREE that:

Definitions

In this Deed, unless the context requires otherwise:

"Business Day" means a day, other than a Saturday or Sunday, on which banks are open in Hong Kong to the general public for business;

"Company" means [●] a company under the laws of [●], particulars of which are set out in Schedule 1;

5.2 *Expand* button



When you click on the **Expand** button, every ClauseLink in the document will be replaced by the latest version of the appropriate clause stored in the Clause library.

You will be prompted to confirm that you want to expand all ClauseLinks in the document (Figure 35 and Figure 36).

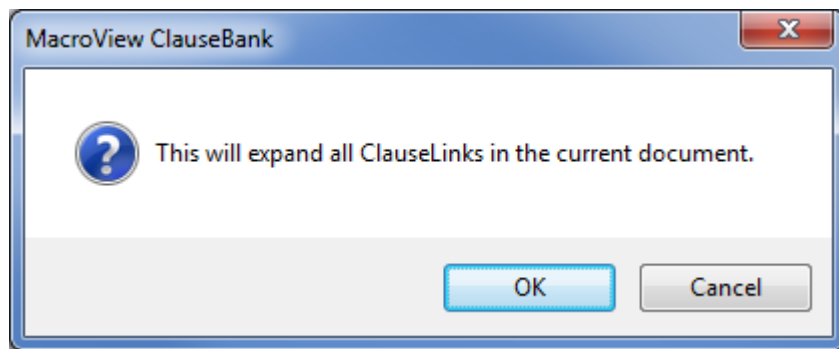


Figure 35: Dialog to confirm expansion of all ClauseLinks in the document

[Clause Link: Business Day](#)

[Clause Link: Company](#)



"Business Day" means a day, other than a Saturday or Sunday, on which banks are open in Hong Kong to the general public for business;

"Company" means [●] a company under the laws of [●], particulars of which are set out in Schedule 1;

Figure 36: Expanded ClauseLinks

6 Right click menus on the Tree-view nodes

6.1 Refresh



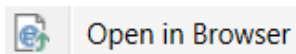
Refresh updates the current node of the tree and everything below. So for example if you have selected a server node, **Refresh** updates all ClauseBanks, libraries, categories and clauses on that server. If you have selected a library node **Refresh** updates all categories and clauses in that library.

The Refresh option appears when you right click a site, library or folder. (See Figure 37) You can also select a site library or folder and press F5 to refresh.

If you *Enable incremental tree refresh* under ClauseBank Options new and removed libraries and folders will be reflected in the tree automatically when:

- Opening the Insert window and the selected treeview item is a library, folder or category.
- Selecting a Library, Category or Folder treeview item.
- Clearing the clause filter text.
- Right-clicking the clauses list and selecting Refresh.

6.2 Open in browser



MacroView ClauseBank allows quick and easy access to the SharePoint sites and libraries that contain the clauses (Figure 37).

If the Options, General, *Allow open in browser* is ticked the **Open in browser** option appears in the menu when you right click a site or a library.

If you click the **Open in browser** option the selected site or library will be opened in SharePoint.

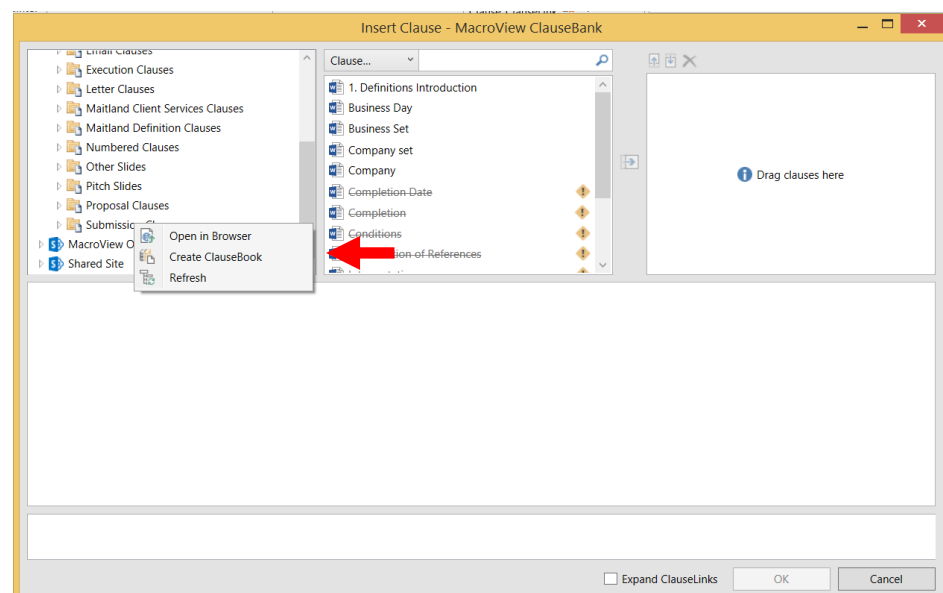


Figure 37 Open in browser and Refresh from site node

6.3 Create ClauseBook

The **ClauseBook** function writes the content and information about all the clauses in a selected Clause Library into the current Word document at the cursor position.

This Word document can be based on a template that controls the layout of ClauseBooks so that the text complies with the formatting requirements of your organisation. This functionality is particularly useful for Content Managers and ClauseBank administrators for reviewing their ClauseBanks.



Create ClauseBook

If the Options, General, *Enable ClauseBook* is ticked the **Create ClauseBook** option appears in the menu when you right click a library.

To create a **ClauseBook** for a Clause Library, select the library then right click and choose **Create ClauseBook** (Figure 37).

The ClauseBook will start with the Library name, Library URL and the date. This is followed by the clause name, clause category, description and clause content for each clause in alphabetic order. (See sample ClauseBook in Figure 38.)

```

Library-Name::Definition-Clauses¶
Site-URL::https://portal.macroview.com.au/sites/clausebank/clausebankdemo/mb¶
Date::21-Jul-2015¶
¶
[Clause-Name::1-Definitions-Introduction]¶
[Clause-Category::A--K]¶
[Description::This should be the first item in the definitions.]¶
THE PARTIES AGREE that:¶

▪ 1. → Definitions¶

    In this Deed, unless the context requires otherwise:¶

    Clause-Link: Authorised Officer¶

    ¶

    [Clause-Name::Bank]¶
    [Clause-Category::A--K]¶
    [Description::Use this for defining Bank]¶
    "Bank" means <<Bank-Name>> authorised to carry on banking business under the
    Banking Act 1959 (Cth) or under the laws of a state.¶

    ¶

    [Clause-Name::Base-Rate]¶
    [Clause-Category::A--K]¶
    "Base-Rate" means, in relation to the Loan or other relevant amount and an Interest Period
    or other relevant period:¶

    (a) → the rate (expressed as a percentage per annum) determined by the Lender; or¶

    (b) → the average of the bank bill swap rates quoted by five Banks authorised to quote on the
    Reuters' Monitor Money Rates Services "BBSW" page selected by the Lender.¶

    ¶

    [Clause-Name::Business-Day]¶
    [Clause-Category::A--K]¶
    [Description::Refers to the business day of a bank]¶
    "Business-Day" means a day, other than a Saturday or Sunday, on which banks are open
    in Hong Kong to the general public for business.¶
  
```

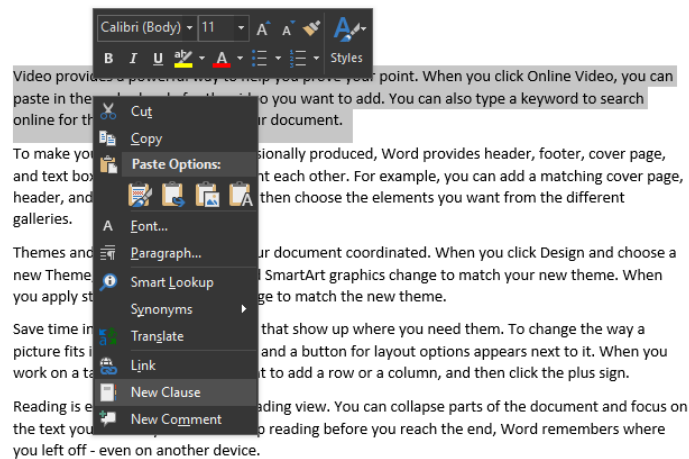
Figure 38: A ClauseBook for the Definition Clauses library

If the Options, Advanced, *Enable modeless insert window* is ticked the ClauseBank dialog won't close after creating a ClauseBook. If it is not ticked the ClauseBank will close automatically after creating the ClauseBook.

7 Creating new clauses

The *New Clause* button appears on the ribbon in Word, PowerPoint and Outlook, if enabled in *Options, General, Enable New Clause button*. If this option is not selected, the button is not available.

New Clause is also available as a right click option when text is selected.



7.1 In Word

If you have text in a Word document that you would like to add as a clause select the clause and choose the *New Clause* button on the ribbon.

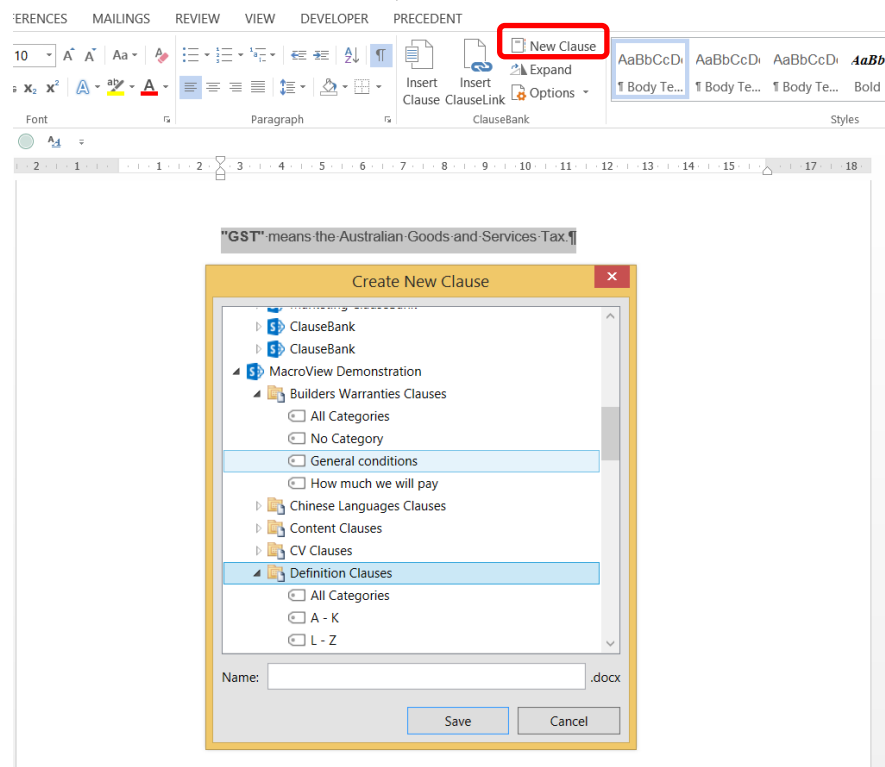


Figure 39: Create New Clause

Type a name for the clause and select the appropriate folder or library in the tree view in the Create New Clause dialog then click Save.

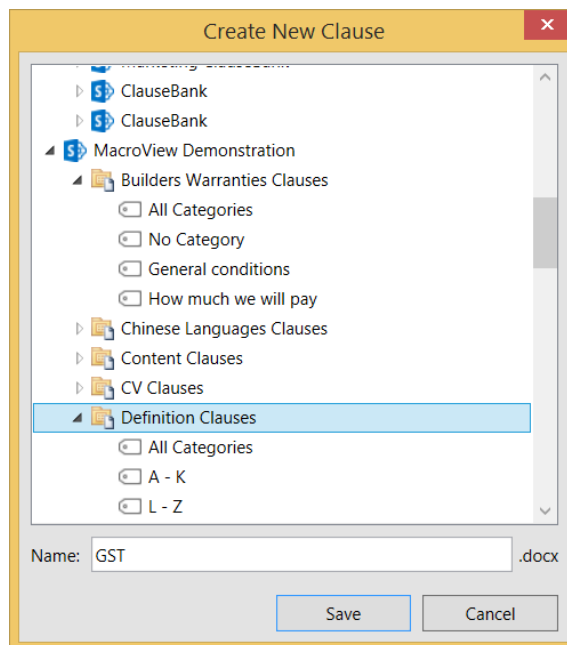


Figure 40: Save the new clause

You will then be prompted to enter the metadata for that clause and then click OK.

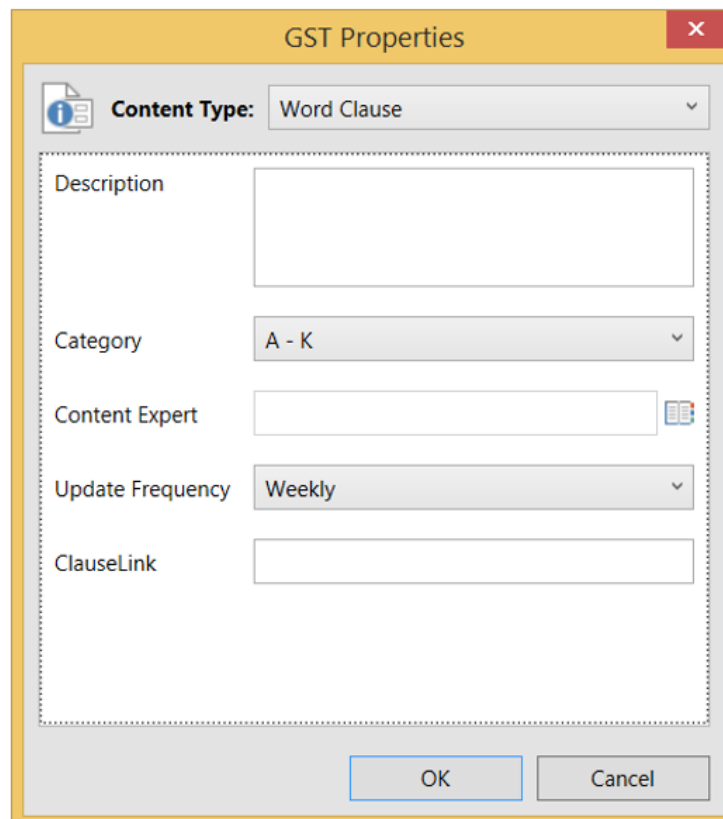


Figure 41: Enter the metadata for the new clause

Once you refresh the ClauseBank site, library or folder the new clause will be visible.

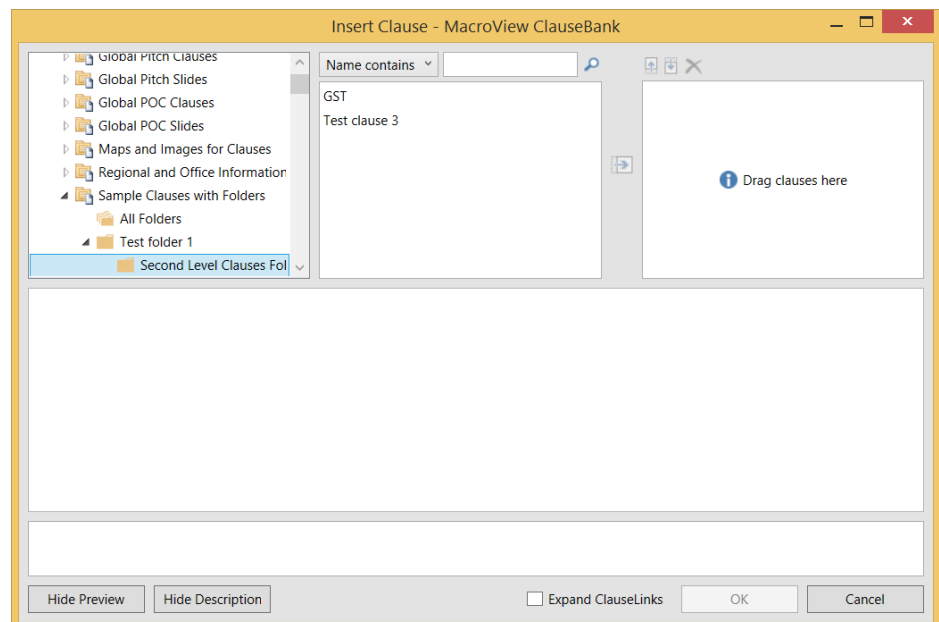


Figure 42: New GST Clause available in a subfolder of the ClauseBank

7.2 In PowerPoint

If you have content in a PowerPoint presentation that you would like to add as a clause select the content and choose the *New Clause* button on the ribbon.

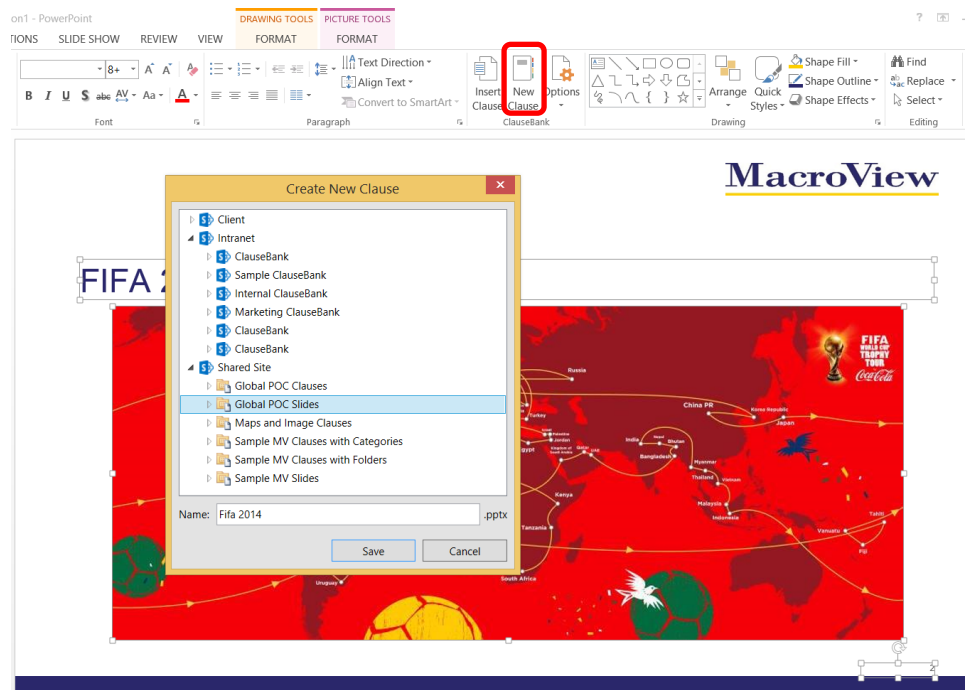
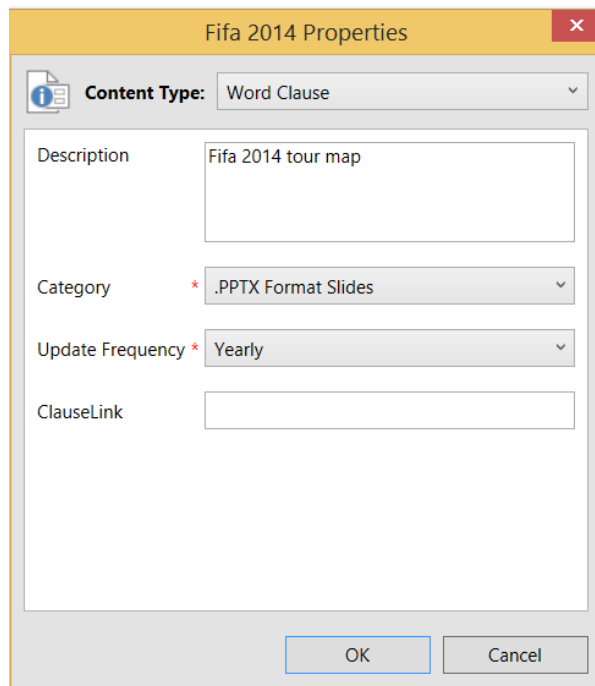


Figure 43: Create New Clause

Type a name for the clause and select the appropriate folder or library in the tree view in the Create New Clause dialog then click Save.

You will then be prompted to enter the metadata for that clause and then click OK.

Note that you are not prompted for a Content expert in PowerPoint



The image shows a dialog box titled "Fifa 2014 Properties". It has a "Content Type" dropdown menu set to "Word Clause". Below this is a "Description" text box containing "Fifa 2014 tour map". There are two dropdown menus: "Category" set to ".PPTX Format Slides" and "Update Frequency" set to "Yearly". At the bottom is a "ClauseLink" text box. "OK" and "Cancel" buttons are at the bottom right.

Figure 44: Enter the metadata for the new clause

Once you refresh the ClauseBank site, library or folder the new clause will be visible.

7.3 In Outlook

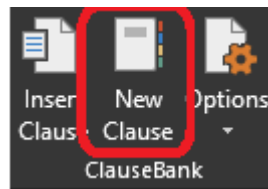
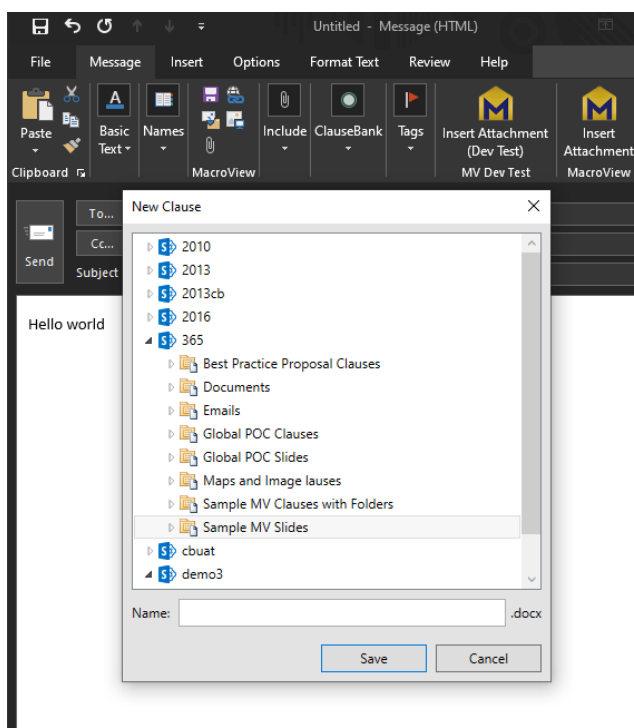


Figure 45: New Clause in the Outlook Ribbon

Select the text and the New Clause button will be available.



8 MacroView ClauseBank Agent

The ClauseBank Agent provides one-way clause synchronization from SharePoint to the user's local computer profile so that ClauseBank can source content locally for previews, clause insertion and expansion. ClauseLinks for which content exists locally can also be expanded even when offline.

This feature of ClauseBank is particularly useful for deployments that are geographically diverse and have limited available bandwidth.

After installing ClauseBank the MacroView ClauseBank Agent system tray application will start automatically. Please note the pre-requisites required in the Installation Guide.

8.1 Adding libraries for synchronization

In order to have libraries automatically added to the ClauseBank Agent, the *Add libraries to ClauseBank Agent* setting in the ClauseBank Content Source dialog must be enabled:

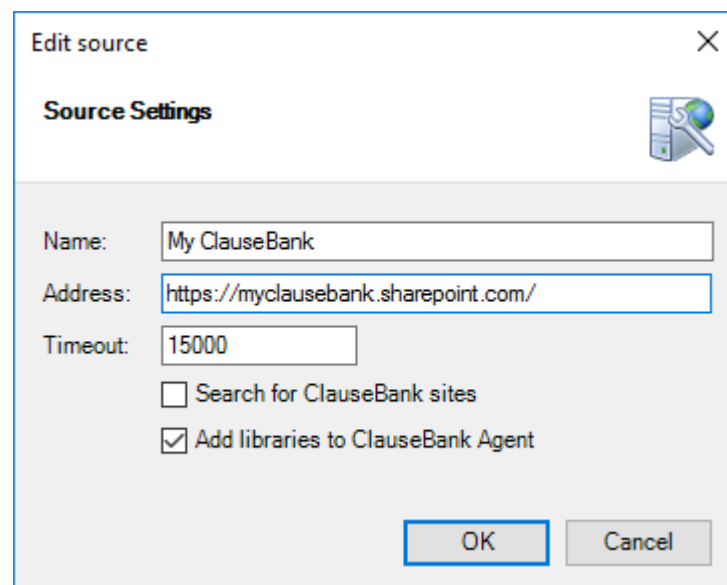


Figure 46: ClauseBank Content Source dialog

Note: After enabling the *Add libraries to ClauseBank Agent* option, a refresh of the source node is required before libraries will commence being added to the ClauseBank Agent.

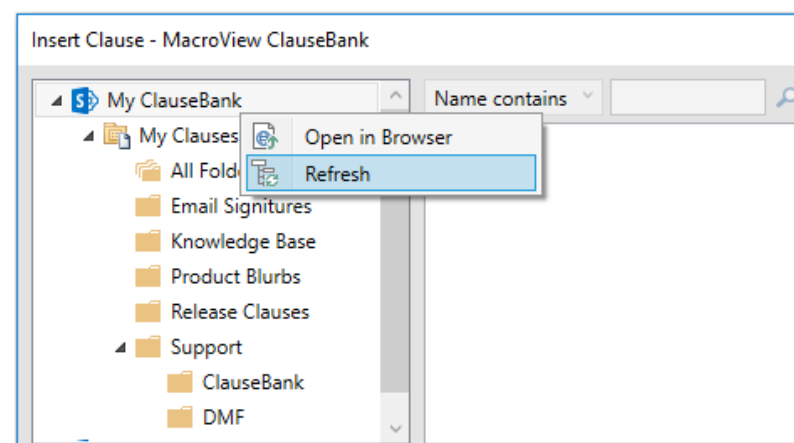


Figure 47: Refresh option on a ClauseBank Source

8.2 Managing Content Synchronization

When the *Add libraries to ClauseBank Agent* setting is enabled, expanding sites in the ClauseBank tree-view will add discovered libraries to the ClauseBank Agent.



The ClauseBank Agent is responsible for managing content sync as well as serving local replica content to the ClauseBank Client. The ClauseBank Agent process is a per-user single instance application that appears in the system tray using this icon.

When you right-click on the ClauseBank Agent system tray icon, you are presented with the following context menu:

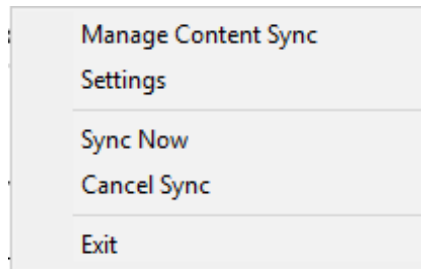


Figure 48: ClauseBank Agent system tray menu

This menu provides access to the following functionality:

- **Manage Content Sync** – displays the content synchronization management dialog
- **Settings** – displays the MacroView ClauseBank Agent options
- **Sync Now** – starts the synchronization process
- **Cancel Sync** – cancels any currently active synchronizations
- **Exit** – Exits the MacroView ClauseBank Agent

The *Manage Content Sync* dialog provides access to libraries that are enabled for Content Sync to view their current status as well as the status of their most recent synchronization and allows you to work with each synchronisation via a right click context menu.

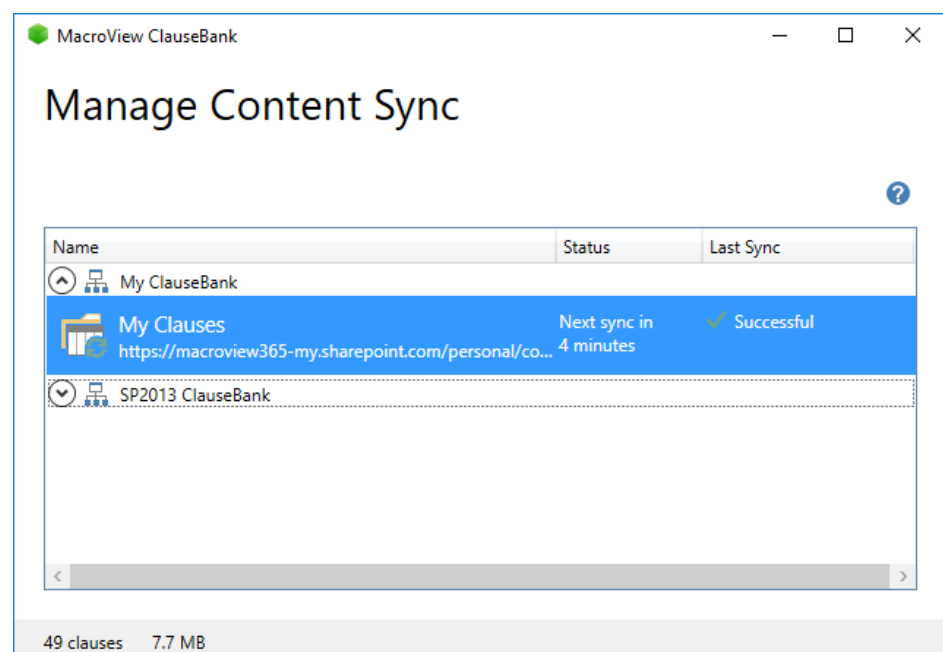


Figure 49: ClauseBank Agent Manage Content Sync window

The options available on the context menu for each synchronization item are:

- **Open** – opens the selected library in the web browser
- **Sync Now** – queues the selected libraries for immediate synchronization
- **Cancel Sync** – cancels synchronization and removes the selected libraries from the sync queue
- **Exclude/Include** – deletes existing synchronization data for the selected libraries and prevents future synchronization from occurring or re-enable synchronization of the library
- **Remove** – deletes existing synchronization data for the selected libraries and completely removes them from the ClauseBank Agent

8.3 Troubleshooting Synchronization



This button at the top right of the *Manage Content Sync* window opens the trace files folder.

All ClauseBank Agent data is stored at:

%LocalAppData%\MacroView\ClauseBank\Agent.

Trace files are store under the *Trace* sub folder and are split into two files:

- **AgentTrace** – contains tracing information for the agent itself
- **SyncTrace** – contains tracing information for synchronization sessions initiated by the agent

8.4 Configuring the Agent

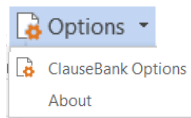
The *Agent* tab on the ClauseBank Options dialog provides access to ClauseBank Agent settings. Refer to section 9.1.4.

When accessing this Options dialog via the *Settings* option on the ClauseBank Agent system tray context menu *General* and *Advanced* tabs are unavailable.

8.5 Limitations of the ClauseBank Agent

- The ClauseBank Agent supports SharePoint 2010, 2013 and SharePoint Online
- You must have the Background Intelligent Transfer Service enabled in Windows (default Windows behaviour) and install all pre-requisites
- You must use Windows authentication for on-premises servers
- Cross-domain authentication scenarios are not supported
- Some deeply-nested library structures may fail to sync if the total path length exceeds the Windows filesystem limit

9 Options



If you click the Options dropdown the ClauseBank Options and About options appear. If you click the Options button the ClauseBank Options dialog displays. (Figure 50).

9.1 ClauseBank Options

Settings in the ClauseBank Options dialog are implemented through user-based registry settings but can also be set and locked by IT administrators using Group Policy.

The **ClauseBank Options** dialog consists of three tabs:

- General
- Content
- Advanced
- Agent

When accessing the dialog from the system tray context menu the General and Advanced tabs are unavailable. The Agent has a trace level setting independent of the ClauseBank Client as synchronization scheduling and operations generate large amounts of tracing when the Information level is selected.

9.1.1 General

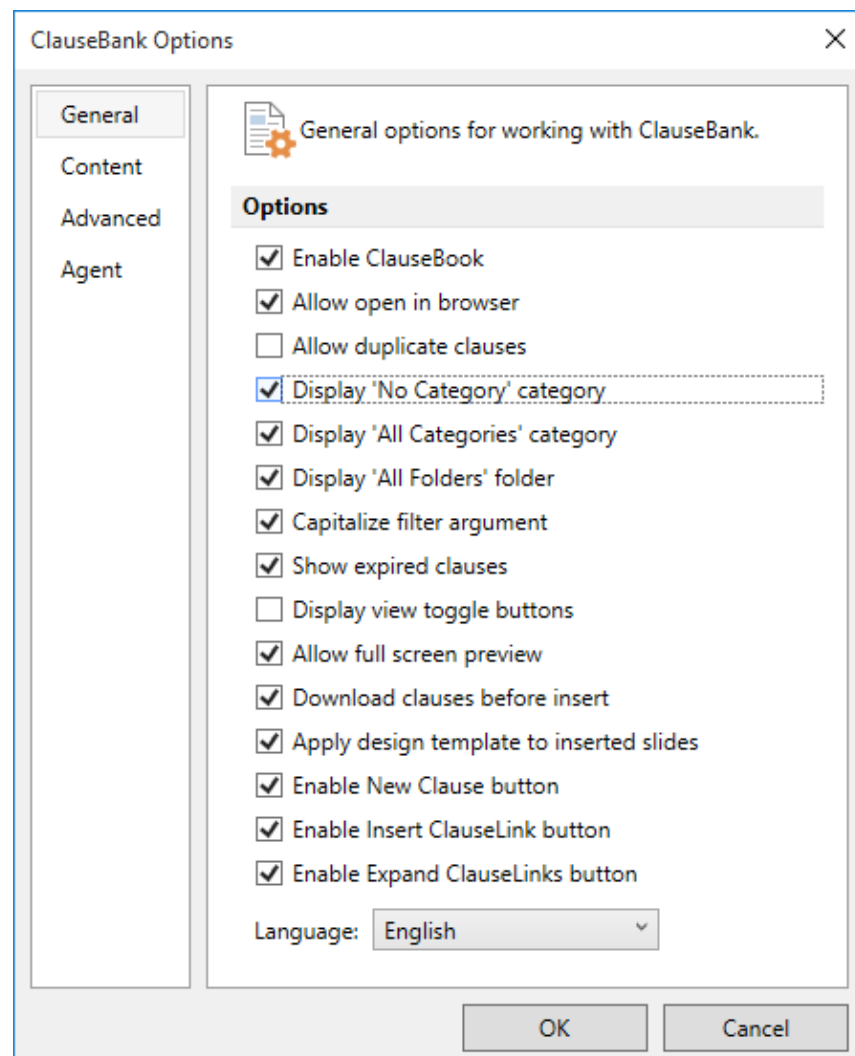


Figure 50: The General tab within ClauseBank Options

Enable ClauseBook

When ClauseBook functionality is enabled, an additional **Create ClauseBook** option is available in the right click menu of the tree when you select a library. When this option is clicked, ClauseBank creates a listing of Clause information and content from the current Clause library (6.3 above). This functionality is particularly useful for Content Managers and ClauseBank administrators.

Allow open in browser

Enabling this option allows you to jump to the current SharePoint site, library or folder in your web browser where you may edit content if you have the appropriate permissions. Some organisations may prefer that you don't access SharePoint directly and will choose to disable this option.

Allow duplicate clauses

When this option is enabled, you are able to insert multiple copies of the same clause into a document at the same time. This is convenient for documents that require multiple signature blocks for instance.

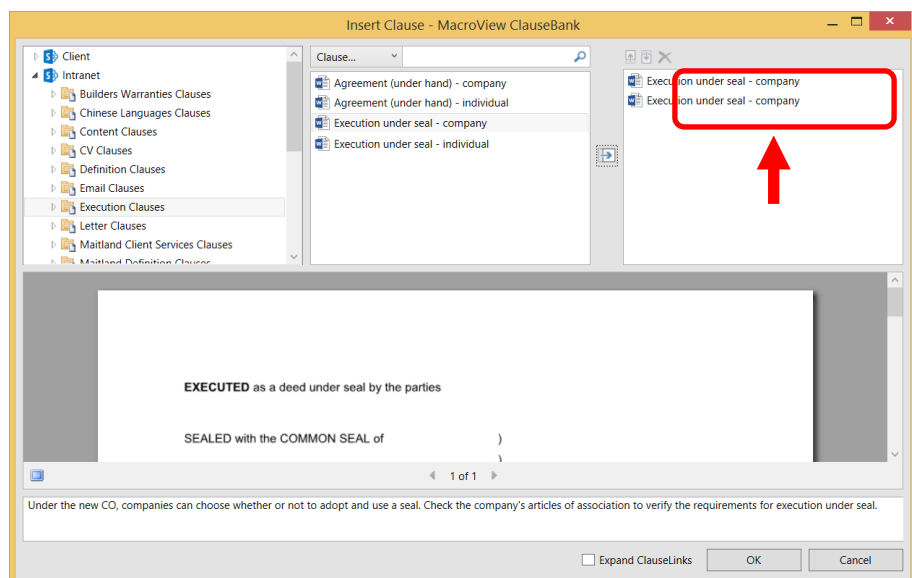


Figure 51: Allow duplicate clauses.

Display 'No Category' category

Adds the 'No Category' node to each library in the tree. When you select *No Category* any clauses in that library that do not have a value category assigned are displayed.

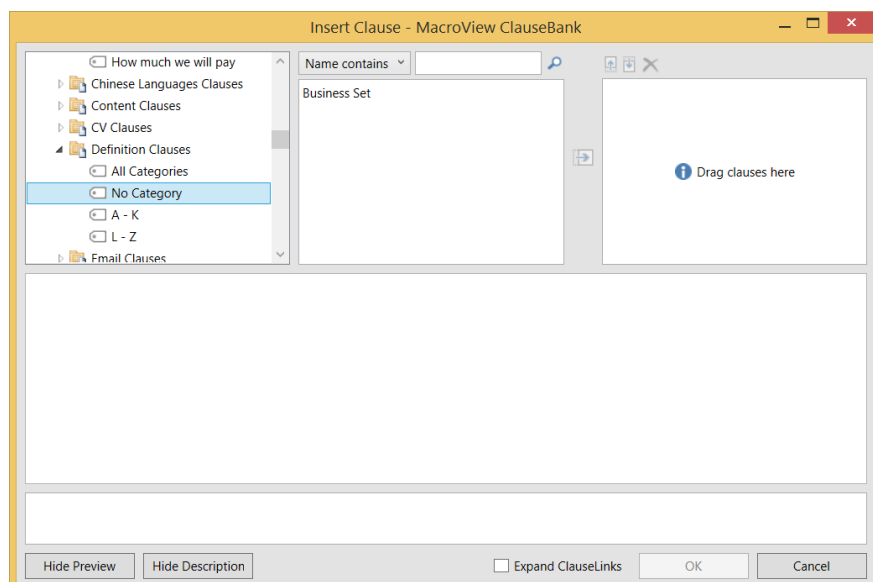


Figure 52: The Business Set clause is not assigned to a category.

Display 'All Categories' category

Adds the 'All Categories' node to each library in the tree. When you select *All Categories* any clauses in that library are displayed regardless of their category.

Display 'All Folders' category

Adds the 'All Folder' node to each library in the tree. When you select *All Folders* any clauses in that library or any of its sub folders are displayed.

Capitalise filter argument

If this option is enabled the **Name contains** filter argument (text) that you enter will be highlighted in each of the clause names that are returned in the filtered list by rendering it in uppercase (Figure 53).

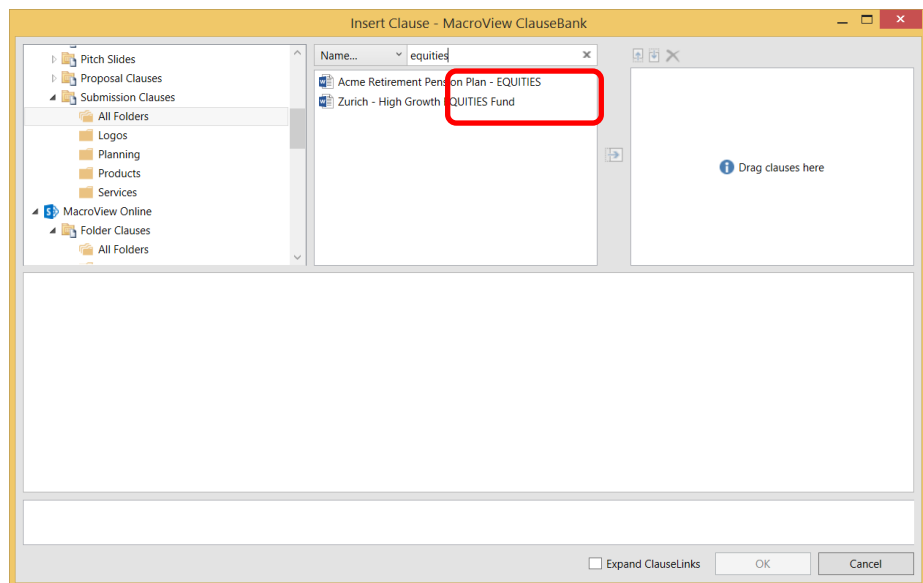



Figure 53: Name contains filter showing capitalisation

Note: This options only applies to the **Name contains** filter argument (text) when *Display advanced search options* is not enabled.

Show expired clauses

When this option is enabled, clauses which have expired are shown with a line through the name and the icon  following them. See the example below. (Figure 54). Though these files can be previewed you cannot select and insert these clauses⁴. If this option is disabled expired clauses will not appear in the clause lists.

⁴ If advanced search is enabled expired clauses may be returned and can be inserted.

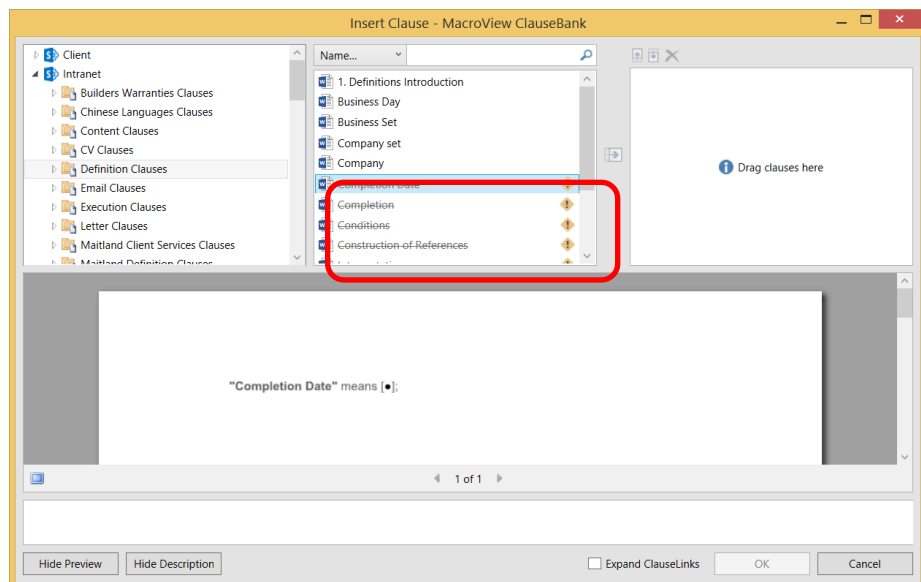


Figure 54: Expired clauses have asterisks on each side of the clause name.

Display view toggle buttons

Enabling this setting will show or hide the *Hide Preview* and *Show Description* buttons on the ClauseBank dialog. Refer the screenshots below. (Figure 55 and Figure 56)

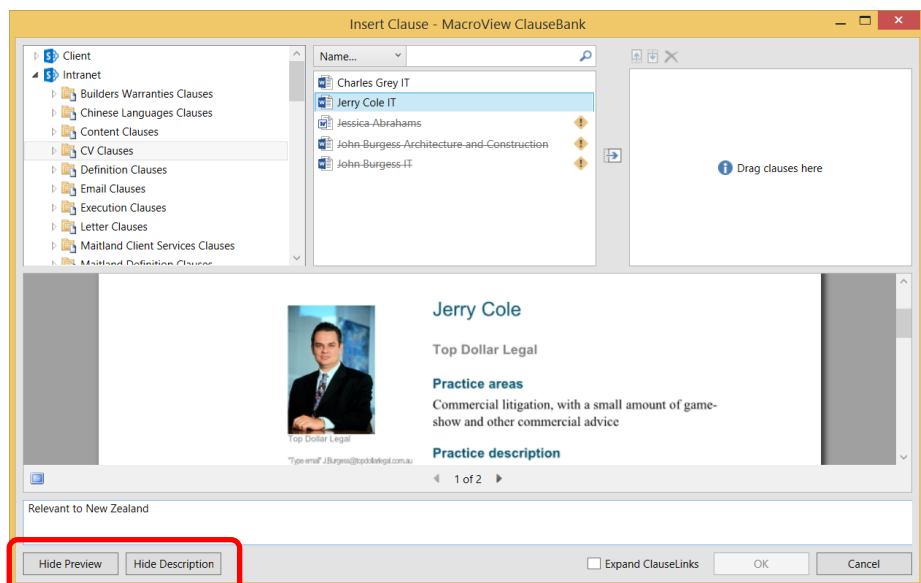


Figure 55: Displaying the view toggle buttons.

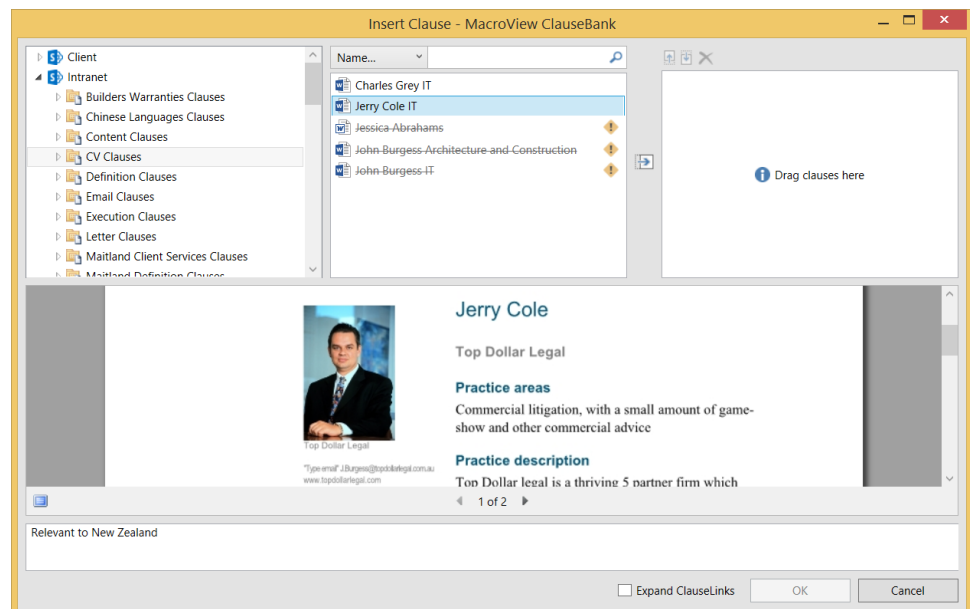


Figure 56: Not displaying the view toggle buttons.

Allow full screen preview

If a clause is selected and this setting is enabled a button appears on the ClauseBank dialog that when clicked allows users to view a full screen preview of the selected clause. (Figure 57)

If the *Use full screen XPS previews* option in Options, ClauseBank Options, Advance is ticked you will also be able to select and copy text from clauses in the full screen preview window.

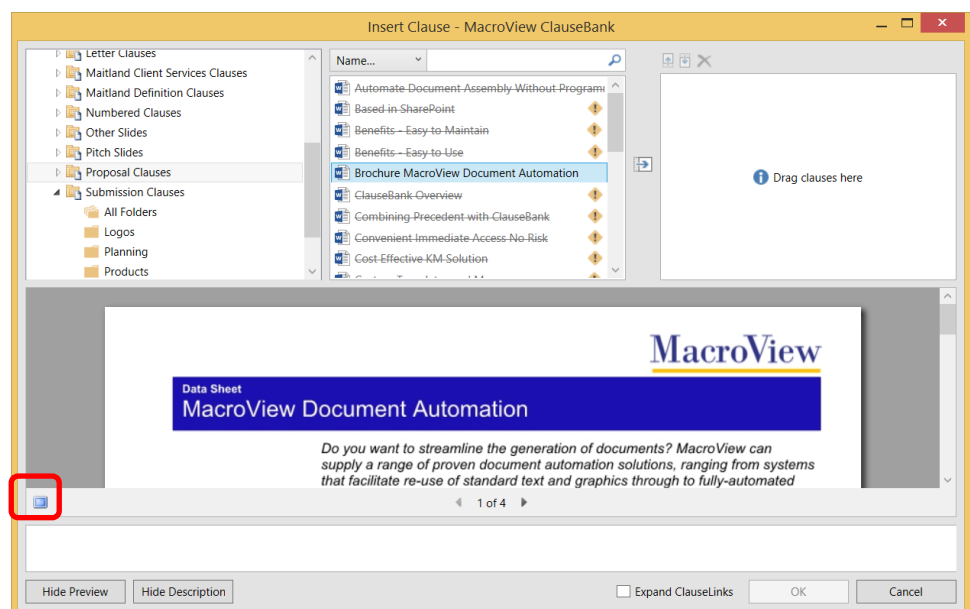


Figure 57: Displaying the view toggle buttons.

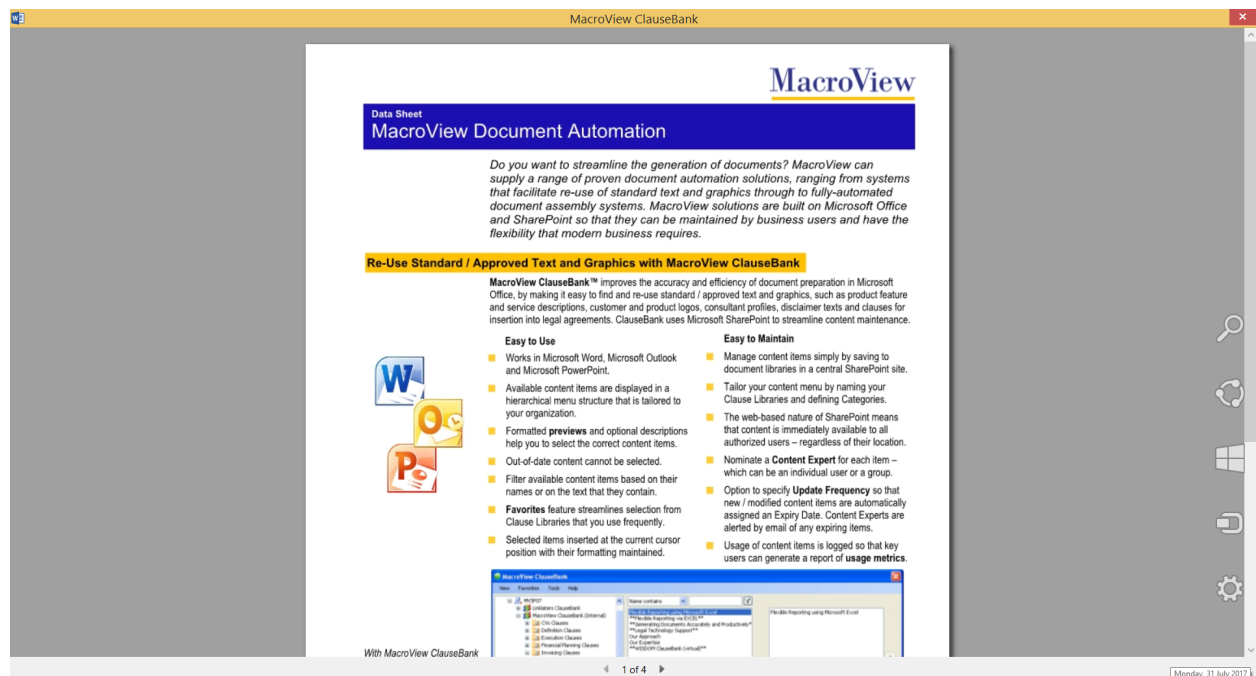


Figure 58: Multi-page clause displayed in full screen preview window

Clicking the **Close** cross at the top right of the window will close the full screen preview window (Figure 58).

Download clauses for insert

Enabling this option causes ClauseBank to use a web request to download the selected clauses to the temporary files path and then insert them into the document. By default, the Clause is downloaded to the Internet Explorer temporary files area and then inserted using a http call into the document. Performance is much improved when inserting a large number of small Clauses when this option is used.

Apply design template to inserted slides

Design templates can be applied to a PowerPoint presentation to give it a professional look. Enabling this setting will apply the design template used in the presentation to all slides that are to be inserted.

Enable New Clause button

Enabling this option allows you to use the New Clause button in Word, PowerPoint and Outlook. If this option is not enabled the button remains greyed out even when you select the content in the current document, presentation or message.

Enable Insert ClauseLink button

Enabling this option allows you to use the Insert ClauseLink button in Word. If this option is not enabled the button is removed from both the Home and Insert tabs.

Enable Expand ClauseLinks button

Enabling this option allows you to use the Expand ClauseLinks button in Word. If this option is not enabled the *Expand* button is removed from the Home tab and the *Expand ClauseLinks* tick box is removed from the Insert Clause screen.

Language

ClauseBank has support for a number of languages including English, French, Spanish, Dutch, German, Russian, Chinese - Simplified, Chinese - Traditional and Thai. Please contact MacroView if you would like ClauseBank in another language.

9.1.2 Content

In the **Content** area of **ClauseBank Options**, you can add, edit or remove ClauseBank Servers. The servers will have been configured by an Administrator. Refer to the MacroView ClauseBank Installation Guide for more detail.

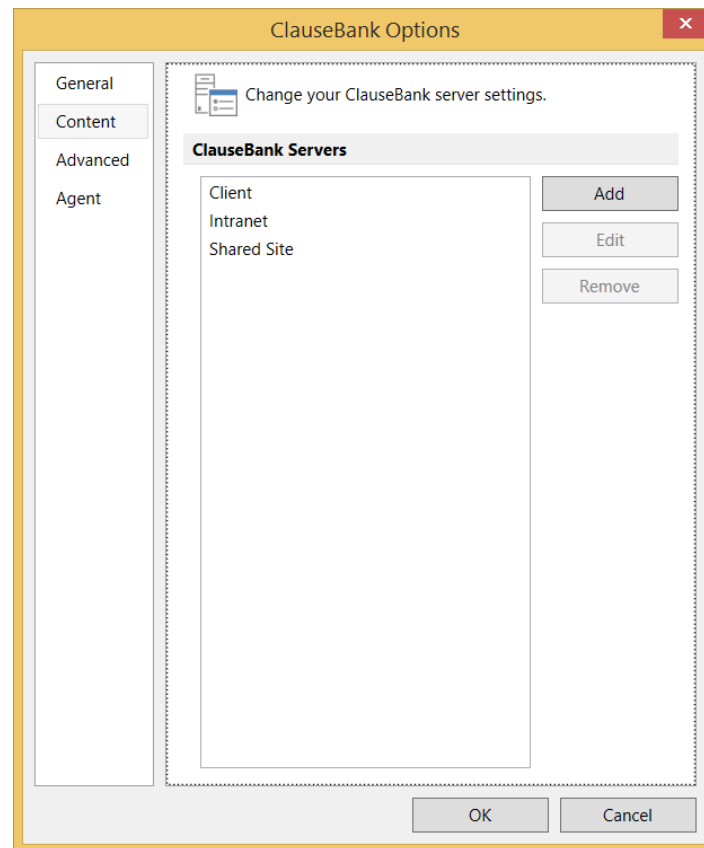


Figure 59: The **Content** screen within **ClauseBank Options**.

When you click the *Add* button the *Add Server* dialog displays.

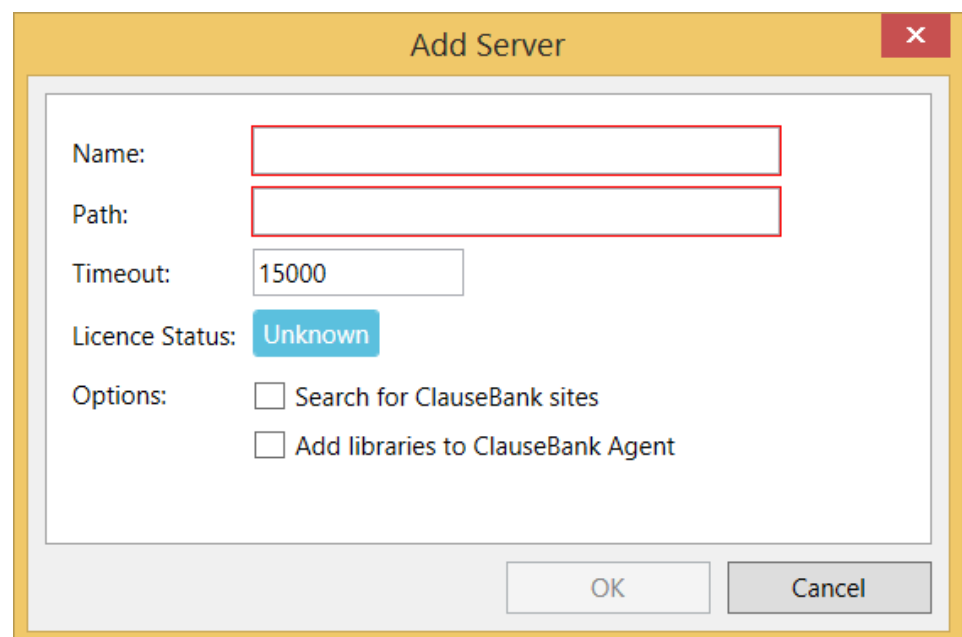


Figure 60: The **ClauseBank Add new source** dialog.

If you enter a server name and address and tick the *Search for ClauseBank sites* option, when you click OK ClauseBank will perform a search and will return all sites with 'ClauseBank' in the site title⁵. If your ClauseBank source

settings change, ClauseBank will refresh your ClauseBank tree-view and clear your ClauseBank tree-view cache.

Alternatively you can add individual sites as ClauseBanks by entering a business user friendly name for the *Name* and the site URL for the *Address*. These sites do not have to contain the word *ClauseBank*.

To synchronize library content to your local computer, enable the *Add libraries to ClauseBank Agent* option. Refer to section 8 for information on the ClauseBank Agent.

9.1.3 Advanced

Figure 61: The Advanced screen within Options, ClauseBank Options

Logging

Allows you to set the amount of information captured by the trace file as ClauseBank performs its normal operations. If any exceptions occur these are logged in the same trace file. These trace files are vital for MacroView support staff to diagnose and resolve issues that may occur.

⁵ This works for all servers other than WSS 3.0 and Foundation 2010.

Enable modeless insert window

Enable Modeless insert window will prevent the ClauseBank window from closing when the 'OK' button is clicked. The document remains fully accessible whilst the ClauseBank window is displayed. Note that only one modeless ClauseBank window can be shown per Office application. For example, if you are working with multiple Word documents, the modeless window is parented to the document that was active when *Insert Clause* was clicked.

Allow clause insert on right click

If the *Allow clause insert on right-click* option is ticked an *Insert* option is added to the right click menu when you select a clause in the middle List Box. This option can be used with or without the modeless insert window. If the window is not modeless it will close after you click *Insert*. (Figure 62)

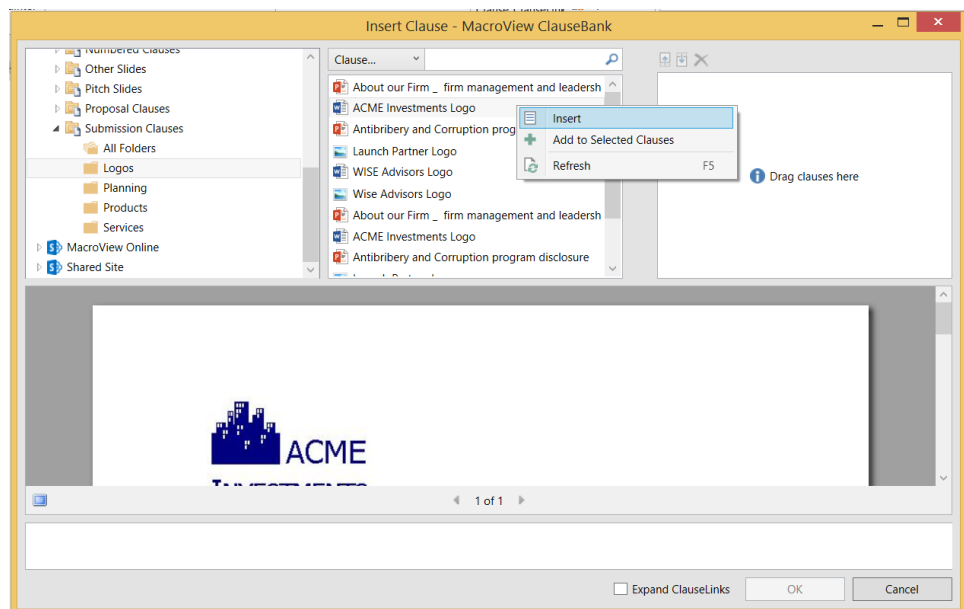


Figure 62: Right click *Insert* available for clauses

Display advanced search options

If you tick the Option, Advanced setting Display advanced search options you will be provided with the following dropdown list of filter options instead of the standard *Name contains* or *Clause contains* options.

- Clause contains the phrase
- Clause contains at least one of these words
- Name contains the phrase
- Name contains at least one of these words

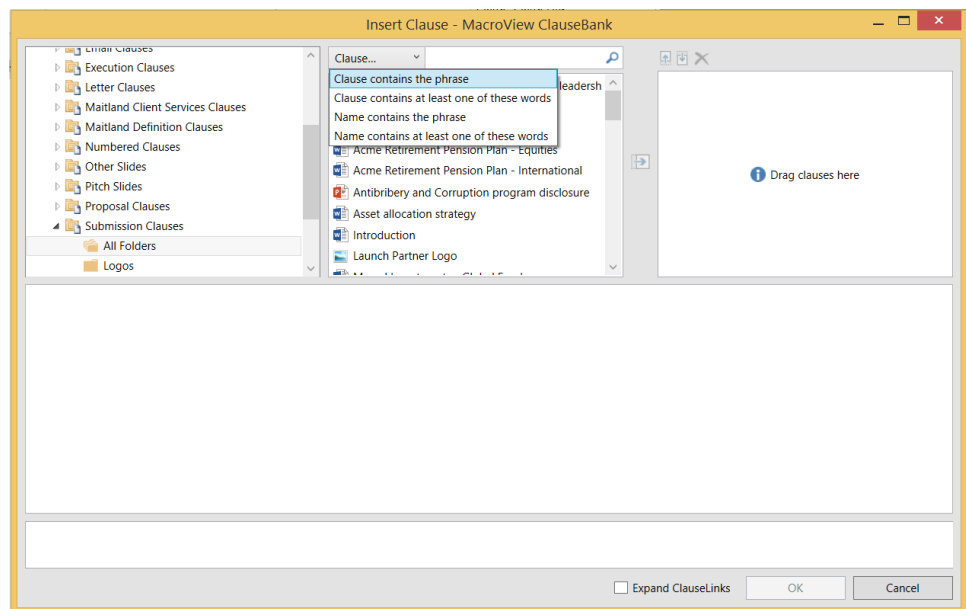


Figure 63 Advanced search options when enabled in Advanced Settings

For a successful search you can enter the asterisk character at the end of parts of words.

All advanced search options utilize the SharePoint search service. No client-side filtering occurs when advanced search options are enabled.

Display preview

Toggles the preview pane on and off on the ClauseBank dialog. (Figure 64 Preview and description panes off)

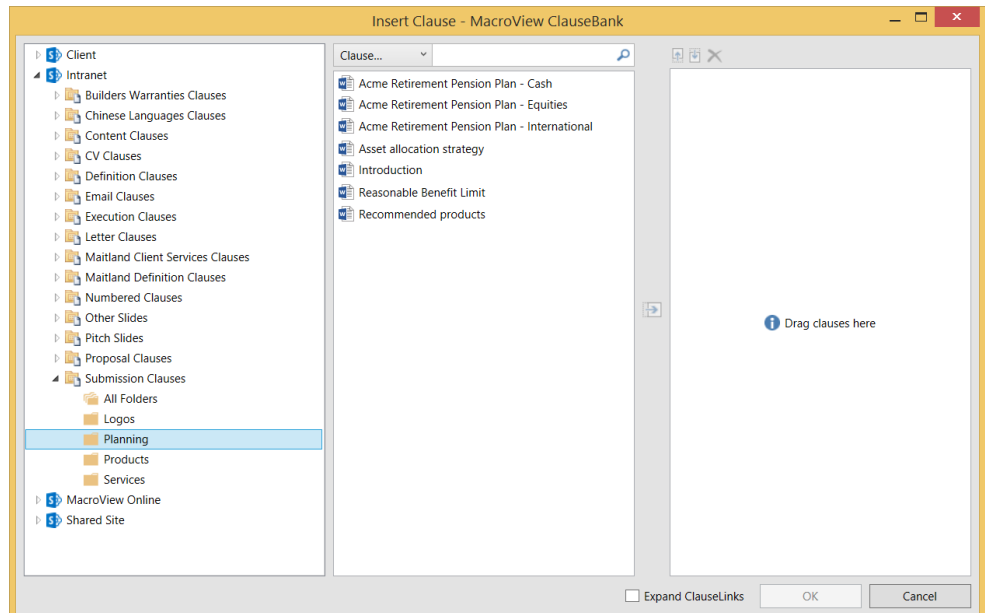


Figure 64 Preview and description panes off

Display description

Toggles the description pane on and off in the ClauseBank dialog. (Figure 64 and Figure 65)

Description text can be copied and can hyperlinks such as http or https URL's and email addresses.

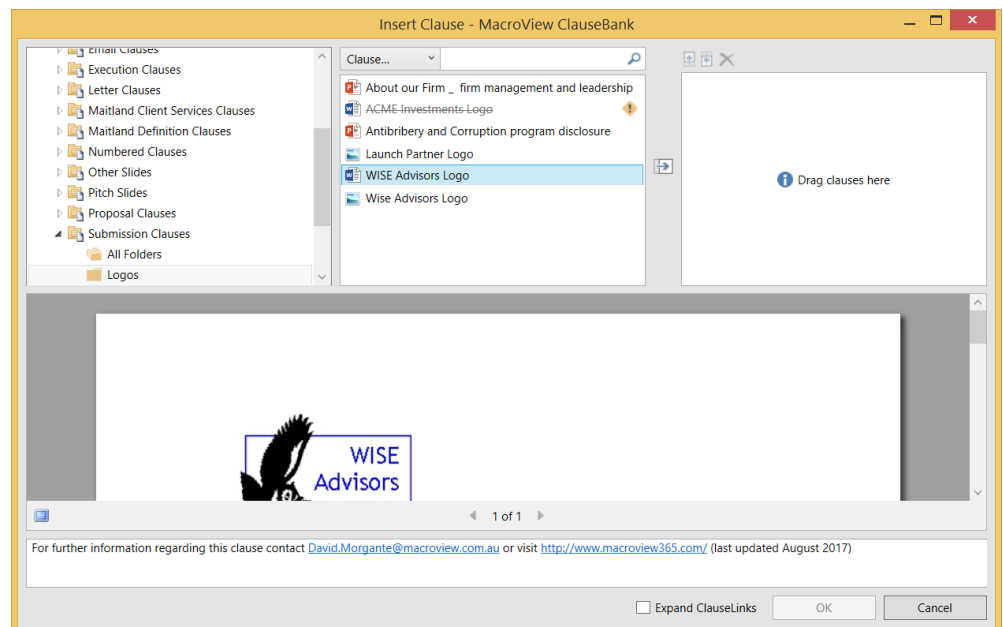


Figure 65 Description pane on

Display clause URL tooltips

If ticked when you hover over a clause you will see the URL path for that clause.

Show clause selection buttons

Toggles the display of the buttons used to move clauses to the third panel, buttons used to rearrange the clauses in the third panel and the button used to delete a clause from the third panel.

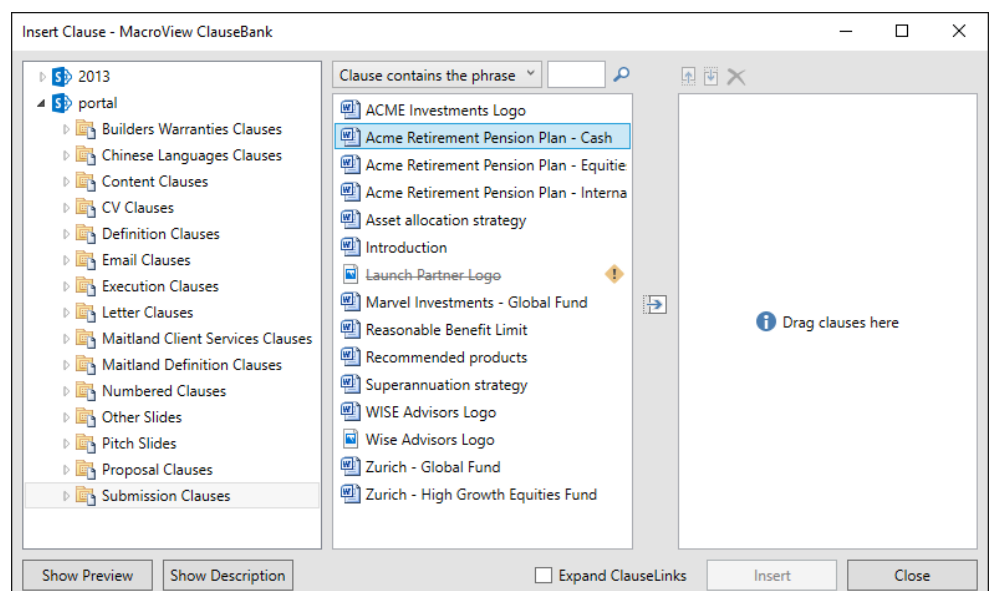


Figure 66 Clause selection buttons off

Enable clause search on sites

If you tick the *Option, Advanced setting Enable clause search on sites* you can enter search criteria into the search panel when you have the ClauseBank site selected and search the contents of that entire site. If this option is not enabled you can only search within the selected library.

Show clause icons

Toggle the display of Office application icons in the selection list

Allow Word clauses in PowerPoint

Toggles whether or not using the Insert Clause option in PowerPoint allows selection of Word clauses.

Allow PowerPoint slides in Word

Toggles whether or not using the Insert Clause option in Word allows selection of PowerPoint slides.

Expand ClauseLinks in headers and footers

Toggles whether or not ClauseLinks in document headers and footers are expanded when you click the Expand button.

Display all document libraries

If you tick this option, the ClauseBank navigation tree will show all document libraries rather than restricting the tree to only show libraries with a name ending in 'Clauses' or 'Slides'.

Use full screen XPS previews

This option will allow you to select and copy text from the clause when using full screen preview window.

Enable incremental tree refresh

ClauseBank will incrementally refresh the parent of the currently selected tree view item when performing a full refresh of the clauses list at the library/folder or category level.

A full refresh of the clauses list occurs when:

- Opening the Insert window.
- Selecting a Library, Category or Folder treeview item.
- Clearing the filter text.
- Right-clicking the clauses list and selecting Refresh.

Enable Modern Authentication

Once you are signed in with Modern Authentication enabled in MacroView ClauseBank, you will only be asked to log in or authenticate if you change your password, sign out or do not use ClauseBank for long periods of time.

This means you will not be prompted to authenticate to SharePoint Online each time you start ClauseBank.

This setting is enabled by default.

Excluded libraries

Libraries with names specified in this list will be excluded from the ClauseBank navigation tree. This applies even when *Display all document libraries* is selected.

9.1.4 Agent

The ClauseBank Options dialog contains a tab for Agent settings:

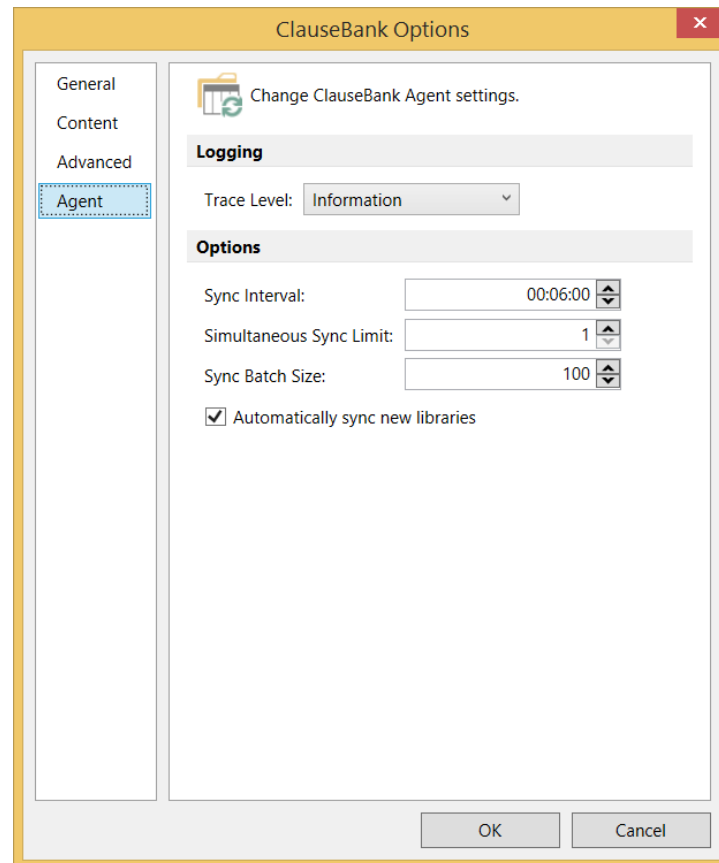


Figure 67: The Agent screen within Options, ClauseBank Options

Trace Level

This setting determines the amount of detail in the Agent and Sync trace files.

The Agent has a trace level setting independent of the ClauseBank Client as synchronization scheduling and operations generate large amounts of tracing when the Information level is selected. See section 9.1.4 for more details.

Sync Interval

This setting determines the interval at which library synchronization occurs. The input box format is Hours:Minutes:Seconds

Maximum Libraries to Sync Simultaneously

This setting determines the number of libraries that can be synced in parallel by the ClauseBank Agent.

Sync Batch Size

This setting limits the number of items to retrieve per request.

Automatically Sync New Libraries

This setting determines whether new libraries added to the agent are included or excluded by default.

9.2 About



Figure 68: The **About** screen within **MacroView ClauseBank Options**

The **About** screen displays:

- the current version of **MacroView ClauseBank**
- copyright information
- MacroView's contact details
- **Trace Files** button.

When you click on the **Trace Files** button Windows Explorer opens the folder where the MacroView ClauseBank trace files are stored. This location varies between operating systems.

Windows 7, Windows 8, Windows 10

`C:\Users\userid\AppData\Roaming\MacroView
ClauseBank`

where `userid` is the current user login.

- **Clear Trace Files** button.
When you click on the **Clear Trace Files** button all MacroView ClauseBank trace files are deleted.

