

## MacroView DMF Professional for Law Firms and Legal Departments

*Enabling document management solutions on Microsoft SharePoint® with the functionality, usability and volume handling to provide a viable alternative to a 'traditional' DM system in a law firm or legal department.*

### Outlook as the Desktop for DM

*"The first thing that attracted us to MacroView DMF was its intuitive tree-view available in Outlook. Without the DMF tree-view, our people would not be able to work efficiently and effectively with SharePoint." Bogdan Ungureanu-Manole IT Application Support Manager, Kinstellar*

A feature of traditional DM systems is their extensive integration in Microsoft Outlook®, which allows you to perform all your DM tasks from Outlook – not just saving emails. MacroView DMF lets you continue to use Outlook as your DM Desktop when you move to DM on SharePoint.

#### View and Navigate the DM Store from Outlook

- MacroView DMF® adds a new pane in Outlook, which displays all areas of SharePoint to which you have permission. Views of libraries are displayed in the right pane of Outlook.
- MacroView pane in Outlook provides intuitive interface for searching across the SharePoint DM store with results displayed in Outlook.
- Formatted previews of files in SharePoint, without needing to download and open.
- Extensive right-click menu for files and areas.
- Right-click to create new Libraries and Folders
- One-click access to your Favorite document sites, libraries and folders in SharePoint.
- Automatic creation of Favorites – e.g. for Matters for which you are a timekeeper.

#### Email Filing

- Drag and drop to save emails or attachments to ANY area in SharePoint where you have rights.
- Automatic capture of email attributes and automatic naming to prevent duplicates.
- Saving performed in the Background.
- Visible indicator that an email has been saved.
- Rule-based filing of sent emails.

#### Attachment Handling

- Drag and drop to save attachments. Profiling (metadata capture) as attachments are saved.
- Rename attachment as it is saved or save as a new version of an existing document.
- Browse, search or right-click on a document to send it as a link or attachment.

Name	Document ID	Version	Modified	Checked Out To
Archived Other		1.0	7/18/2012 3:54 PM	
Archived Proposals		1.0	7/18/2012 3:55 PM	
1-800-FLOWERS.COM_24Dec01 00.34.00_Finish your shopping.msg	MVLEGAL-236011383	1.0	6/26/2011 10:20 PM	
1-800-FLOWERS.COM_26Dec01 23.49.00_Treat yourself to sa.msg	MVLEGAL-236011387	1.0	6/26/2011 10:20 PM	
AgendaBootCamp2011May.pdf	MVLEGAL-236079066	1.0	7/26/2012 5:49 PM	
Agreement MacroView SalesAgent PointBeyond.pdf	MVLEGAL-236078829	1.0	6/15/2012 2:06 AM	System Account
Agreement.docx	MVLEGAL-236078835	15.0	8/2/2012 11:34 AM	
Billing Statements.docx	MVLEGAL-236011392	2.0	7/3/2012 5:57 PM	Noel Williams
Board Minutes February 2011.pdf	MVLEGAL-236011396	0.1	6/3/2011 1:26 AM	
CaseStudy\WinstonStrawnDMFLegal.docx	MVLEGAL-236078996	1.0	7/9/2012 4:29 PM	
CaseStudy\WinstonStrawnDMFLegal.pdf	MVLEGAL-236079003	1.0	7/9/2012 4:29 PM	
Channel strategy, selection, and management plan 2010-2011.xlsx	MVLEGAL-236011401	0.1	6/3/2011 1:26 AM	
Conference Agenda.xlsx	MVLEGAL-236011404	0.1	6/3/2011 1:26 AM	

**MacroView**

**Winston & Strawn LLP:**  
Enabling Legal DM on SharePoint with MacroView DMF

*Leading US law firm Winston & Strawn LLP has been successfully using a legal document management solution based on Microsoft SharePoint for over 12 months. The solution, which was deployed in Winston's Houston office in less than a month, uses MacroView Document Management Framework (DMF) to significantly extend the functionality and enhance the user experience of SharePoint 2010 as a document management platform.*

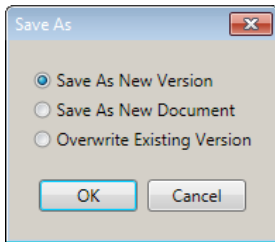
**SharePoint Experience at Winston Strawn**

Winston & Strawn LLP, founded in 1853, is one of the oldest and largest law firms in

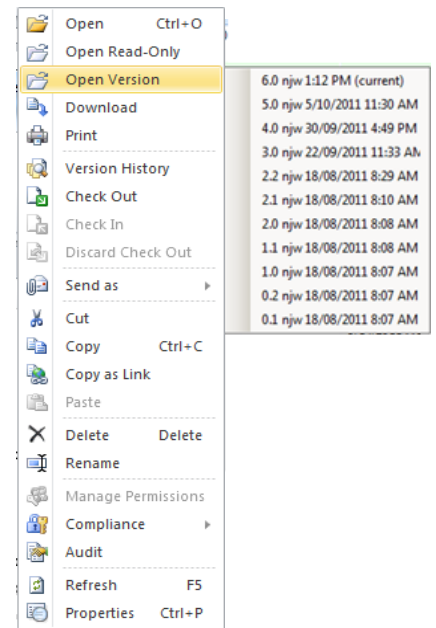
## Data Sheet

### Versioning, Check Out / Check In

MacroView significantly enhances the user experience and extends the capability of SharePoint in relation to check out, check in and versioning, which are fundamentally important aspects of legal DM



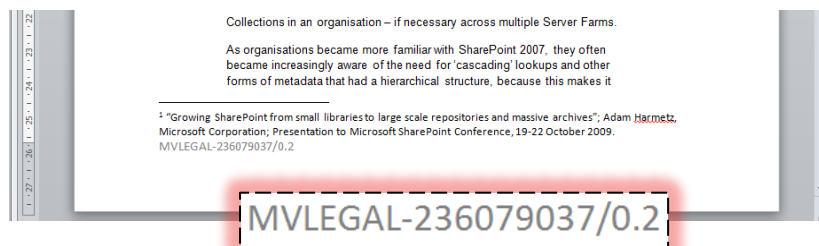
- Auto check-out on open – removes the need to a user to check-out in a separate step.
- Custom dialog on Save As / Close provides a streamlined experience which is familiar to users coming from a traditional DM system.
- Supports replacing a Major version as you save an edited document back to SharePoint.
- Search for documents *Checked Out to Me*.
- Right-click to open a version of a document or to inspect Version History.
- Version history preserved as you move a document between document libraries even between different web applications.



### Document Numbering and Referencing

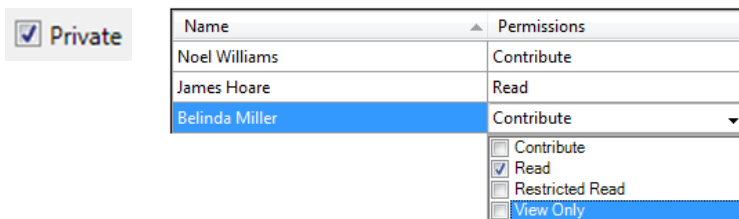
SharePoint 2010 provides a native unique document numbering capability, which MacroView extends and enhances so that it meets the needs of legal DM users.

- Number documents uniquely across the entire SharePoint document store – not just within each Site Collection.
- Document footers are updated automatically to show Document Reference (Document ID, Version and other metadata)
- Updates the caption of the Word window to show Document ID and current version.
- Improved control over the formatting of unique Document IDs, incl. starting offset.



### Securing Documents

Users of traditional DM systems can check a box to make a document Private and also nominate specific permissions for selected other users and groups. MacroView provides this capability on SharePoint.



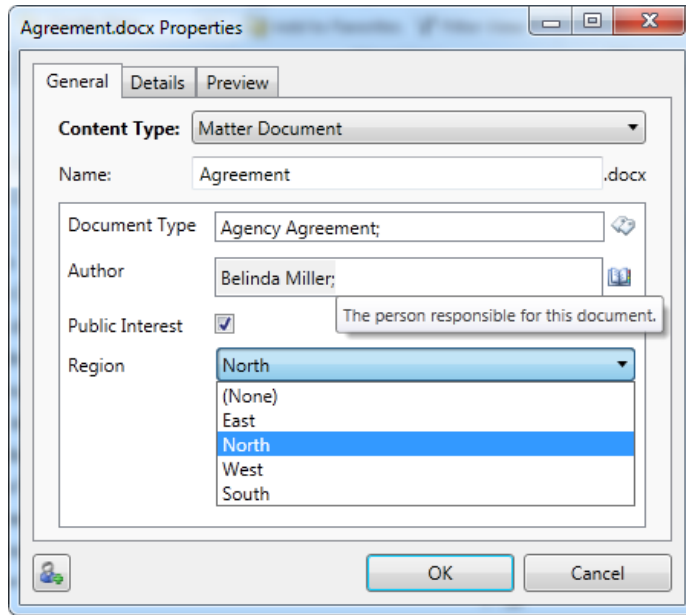
- Check *Private* box in Profiling dialog to make a document 'For My Eyes Only'- just like a traditional DM system.
- *Manage Permissions* dialog provides an easy means for end-users to set and remove Document Level security.
- Fully respects SharePoint security model and works with 3<sup>rd</sup> party Ethical Wall add-ons.

“Our users appreciate how MacroView DMF provides a range of different ways to view and interact with the SharePoint document store. With MacroView DMF we were able to leverage our SharePoint investment beyond client portals, intranets and websites to more cost effectively facilitate practice and firm management.”  
**Ellen Kinsinger, CIO, Poyner Spruill LLP**

## Data Sheet

### Profiling / Metadata Handling

MacroView DMF builds on the inherent flexibility of SharePoint to make profiling / metadata capture a consistent experience that is easier and more efficient than with a traditional DM system.



- Intuitive DMF Profiling dialog supports all SharePoint field types including Person/Group and External Data.
- Dynamically reflects library structure – new metadata columns appear automatically the next time a document is saved to the Library.
- Automatic recording of email attributes.
- Personal defaults reduce user profiling effort.
- Eliminates Document Info Panel (DIP).
- User-friendly interface for Managed Metadata columns, including browsing of term store hierarchies and type-ahead value selection.
- Prompt once-only when saving multiple files.
- Automatic metadata for Client and Matter.
- Respects / reuses metadata on moving and copying files between document libraries.

### Intuitive, Convenient Searching for Documents and Emails

MacroView DMF lets you harness the power of SharePoint 2010 (or FAST) Search while you continue to work in familiar applications such as Outlook, Word, Excel and PowerPoint.

*“For my money, MacroView’s email management capabilities are the best available in the market bar none. My users can now drag and drop emails to SharePoint without prompting or duplication. They can also search for emails and documents in SharePoint without leaving Outlook.”*  
**Aaron MacDougall**  
**IT Director**  
**Ballentine Partners**

- Supports searching by metadata (including Document ID) and / or content.
- Finds PDFs based on their text content and emails based on text in their attachments.
- Supports wildcards, saved searches and searches for My Documents.
- Supports FAST refiners.
- DMF Search Panels are readily configurable to reflect your metadata usage.
- Preview search results and browse to related documents while you are working in Outlook.
- Uses existing SharePoint / FAST indexes – no additional indexes or crawls required.

Server	Search Type
Document Store	Matter Search
Document Name	<input type="text"/>
Client	<input type="text"/>
Matter	<input type="text"/>
Document ID	<input type="text"/>
Result type	<input type="text"/>
Author	<input type="text"/>
Modified Date	<input type="text" value="31/07/2012"/> <input type="text" value="31/07/2012"/>
Any of these words	<input type="text"/>
Checked out to me	<input type="checkbox"/>
<input type="button" value="Clear"/> <input type="button" value="Search"/>	

### Save PDFs direct from Adobe Reader and Acrobat



- Save PDFs to SharePoint direct from Adobe Reader or Adobe Acrobat.
- Choose the destination document library or folder from the intuitive DMF tree-view display of the complete SharePoint store.
- Consistent, intuitive metadata capture.
- Versioning respected and existing metadata displayed for editing as you re-save a PDF back to SharePoint – ideal for workflow applications around PDF scanned images.

“SharePoint has emerged as a viable and economical solution in the DM space. SharePoint 2010 coupled with MacroView creates a legal specific DM system with all of the elements required for a firm our size including custom document numbering, version control, true Outlook integration and custom handlers for the saving of documents in the Microsoft Office applications and Adobe Acrobat.”

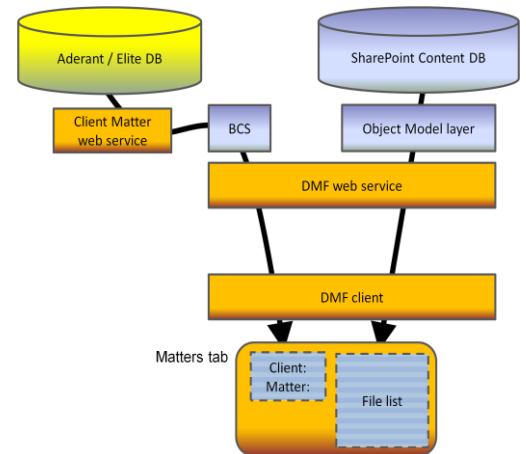
**Matt van Ordstrand, Senior Manager Practice Support Services, Winston & Strawn LLP**

### Client / Matter Centric Operation

**MacroView DMF Professional for Legal Departments** provides a tree-view that is an intuitive next step from Outlook and File Share folder structures and which is relevant for both legal and administrative activity.

**MacroView DMF Professional for Law Firms** includes this tree-view and also features dynamic integration with existing Practice Matter management systems, to streamline working with external Clients and Matters.

- Client Matter site / library structure.
- *Matters* tab lets you pick a Matter that exists in your Practice Management System – DMF will display the documents for the Matter.
- *Pending Matters* option to support saving of documents in relation to new Matters.
- Automatic metadata for Client and Matter. Archiving of matters.
- DMF Professional for Law Firms ships with tools for integrating with existing Practice Management Systems, for both access to and provisioning of new Clients & Matters.
- Prototype Matter system based on lists.



### Volume Handling

MacroView DMF has demonstrated ability to work efficiently with large SharePoint document stores, containing thousands of sites and libraries and millions of documents. The purpose-built DMF web service (Patent Pending) utilizes the SharePoint and Office object models to remove a number of volume limitations present in out-of-the-box SharePoint and also enables significant extensions to DM functionality.

### Hybrid Cloud Support



The MacroView DMF tree-view can display multiple SharePoint servers, including Servers that are hosted externally. DMF v7.5 will support SharePoint servers that do not have the DMF web service loaded – e.g. Microsoft Office 365 / SharePoint Online servers – thereby providing a true hybrid cloud capability.

- DMF tree can display multiple Servers.
- Support for all Authentication methods, including Claims-based, SSL, Integrated.
- Drag and drop to move / copy documents between Office 365 and on-premise servers.

### Other Features

- *Right-click, Print* to print a document.
- Recent Files, Usage History.
- Move or Copy one or multiple documents between Libraries, including on a different Site Collection or Server. Version History is maintained and metadata respected.
- Convenient access to Compliance features, such as Legal Holds & Declare as Record.
- Offline operation – including easy connection to SharePoint Workspace (if available).
- Upload one or multiple files with metadata from any Windows / file share folder.
- Client-side deployment via MSI, settings configurable via Group Policy
- Server-side deployment via SharePoint WSP.

