

MacroView product comparison checklist

Product features	Microsoft SharePoint	MacroView Message	MacroView DMF	MacroView Case & Matter
Supports Microsoft SharePoint On-premises, SharePoint Online and OneDrive for Business	-	✓	✓	✓
Integrates with Microsoft Outlook	✗	✓	✓	✓
Easy access to open, save and search files in Microsoft Word, Excel, PowerPoint and Adobe (PDF)	✗	✗	✓	✓
Includes its own "Windows like" File Explorer	✗	✗	✓	✓
Provides an easy drag and drop user experience to bulk save emails and documents to SharePoint	✗	✓	✓	✓
Provides an accurate tree display of sites, sub-sites, document libraries, document sets and folders for which the user has permission	✗	✓	✓	✓
Formatted previews of emails and documents	✗	✓	✓	✓
Automatic capture of metadata	✓	✓	✓	✓
Ability to mark frequently used areas of the document store as a <i>Favorite</i> for quick access and retrieval	✗	✓	✓	✓
Quick access to <i>Recent</i> used files, locations and searches in the document store	✗	✓	✓	✓
Configurable search panels providing a powerful search capability (using SharePoint Search)	✗	✓	✓	✓
Highly configurable patented document management framework designed for volume with right-click customisation capability	✗	✓	✓	✓
Extensible with other business systems (e.g. line of business, CRM, templates)	✓	✓	✓	✓
Install-and-go solution with built-in provisioning	✗	○	○	✓
Unique Document Numbering (UDN) ¹	✗	✗	○	✓
Advanced Office Integration (AOI) ²	✗	✗	○	✓
Predictive Email Filing (PEF) ³	✗	○	○	○
Enhanced Document Security (EDS) ⁴	✗	○	○	○

LEGEND: - Not applicable | ✓ Included | ✗ Not available | ○ Optional

¹ **Unique Document Numbering (UDN)** arranges for documents to be numbered sequentially across the whole document store and for a unique *Document ID* and current *Version* number to be displayed in the footer of Word and Excel documents that are opened from SharePoint, with automatic update of version number as the document is closed.

² **Advanced Office Integration (AOI)** provides an enhanced menu of version control options as you close an Office document that you have opened from SharePoint and edited.

³ **Predictive Email Filing (PEF)** provides a smarter filing capability and suggested save locations. Currently not available for SharePoint Online.

⁴ **Enhanced Document Security (EDS)** makes it easy for a user with contribute or higher role to update the permissions for a document set, folder or document to be *My Eyes Only* (by checking a Private box in the metadata capture dialog) and/or to assign specific access permissions to selected other users and/or groups. Currently not available for SharePoint Online.