

MacroView ClauseBank™ Version 7

Administration 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. It also supports the retrieval and insertion of slides into a Microsoft PowerPoint presentation. 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eliminates the time wasted in searching for material in previously generated documents and the risk of using an out-of-date copy.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 markup 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 and Microsoft SharePoint.

MacroView was a finalist in the Microsoft 2009 Information Worker Solutions Partner of the Year and is a Microsoft Gold Certified Partner for Information Worker Solutions and Software Solutions.

2 Creating a Sample ClauseBank Site

Using Internet Explorer, navigate to a SharePoint site e.g. <http://SERVERNAME>

- Select Site Actions, Site Settings and the 'Sites and Workspaces' link.
- Click on the Create link and ensure that the phrase 'ClauseBank' is used within both the Title and URL name fields.
- Select the ClauseBank Sample Site template (located within the Custom tab) and then click the OK button.

Figure 1: New SharePoint Site Page

- Ensure that 'read' permissions (or higher) are granted to ALL potential ClauseBank users.

2.1 Activate the MacroView ClauseBank Site Feature

This feature adds the Clause Library list definition to a SharePoint site and enables the Clause Expiry event receiver. The event receiver automatically sets the expiry date for a clause when an update frequency is specified.

- Using Internet Explorer, navigate to the SharePoint ClauseBank site e.g. <http://SERVERNAME/ClauseBank>
- Select Site Actions, Site Settings and Site Features.
- Activate the MacroView ClauseBank site feature.

Figure 2: Site Features Page

3 Creating a 'Clauses' Library

Using Internet Explorer, navigate to the ClauseBank site and add a 'Clauses' document library.

- Select Site Actions and then Site Settings.
- Under the Site Administration heading select 'Site Libraries and Lists' and then 'Create New Content'.
- Select the 'Clause Library' template
- Ensure that the Name field ends with the text 'Clauses' or 'Slides' and then select Create.

SERVERNAME > Create > New

New

Name and Description
Type a new name as you want it to appear in headings and links throughout the site.
Type descriptive text that will help site visitors use this document library.

Name:

Description:

Navigation
Specify whether a link to this document library appears in the Quick Launch.

Display this document library on the Quick Launch?
 Yes No

Document Version History
Specify whether a version is created each time you edit a file in this document library.
[Learn about versions.](#)

Create a version each time you edit a file in this document library?
 Yes No

Document Template
Select a document template to determine the default for all new files created in this document library.

Document Template:

Figure 3: New Document Library Page

- Browse to the newly created 'Clauses' document library using Internet Explorer.
- Select Settings and then Document Library settings.
- Find and select the column named Category.
- Enter the category choices for this clause library into the 'Type each choice on a separate line:' field and select OK.

SERVERNAME > WISDOM Clauses > Settings > Edit Column

Change Column: WISDOM Clauses

Use this page to edit a column of this document library.

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Type each choice on a separate line:

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Figure 4: Change Column Page

Note: Categories for a 'Clauses' or 'Slides' library must be populated for MacroView ClauseBank to function correctly.

4 Managing Clauses

4.1 ClauseBank Structure

MacroView ClauseBank content is stored in Document Libraries within a Windows SharePoint Services site. Each clause is stored as a document in one of these document libraries. (Clause Libraries)

Each Clause Library must contain a custom column called Category.

MacroView ClauseBank displays the names of the clause documents in a two level hierarchical menu. The top level of this menu consists of the names of the clause libraries. The second level is populated using values of the category column within the selected clause library.

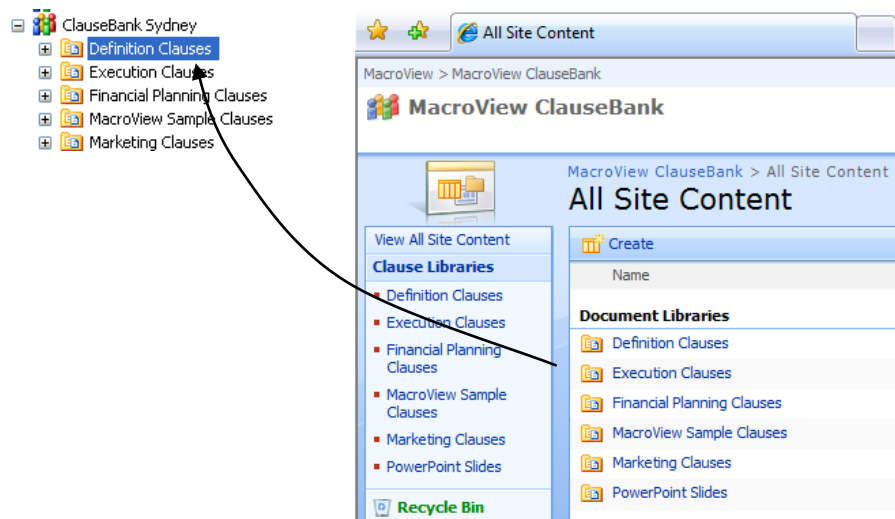


Figure 5: SharePoint document library list and ClauseBank Library in tree-view.

Selecting a Clause Library will show all the clauses that it contains grouped according to their categories. See Figure 6 and Figure 7 below.

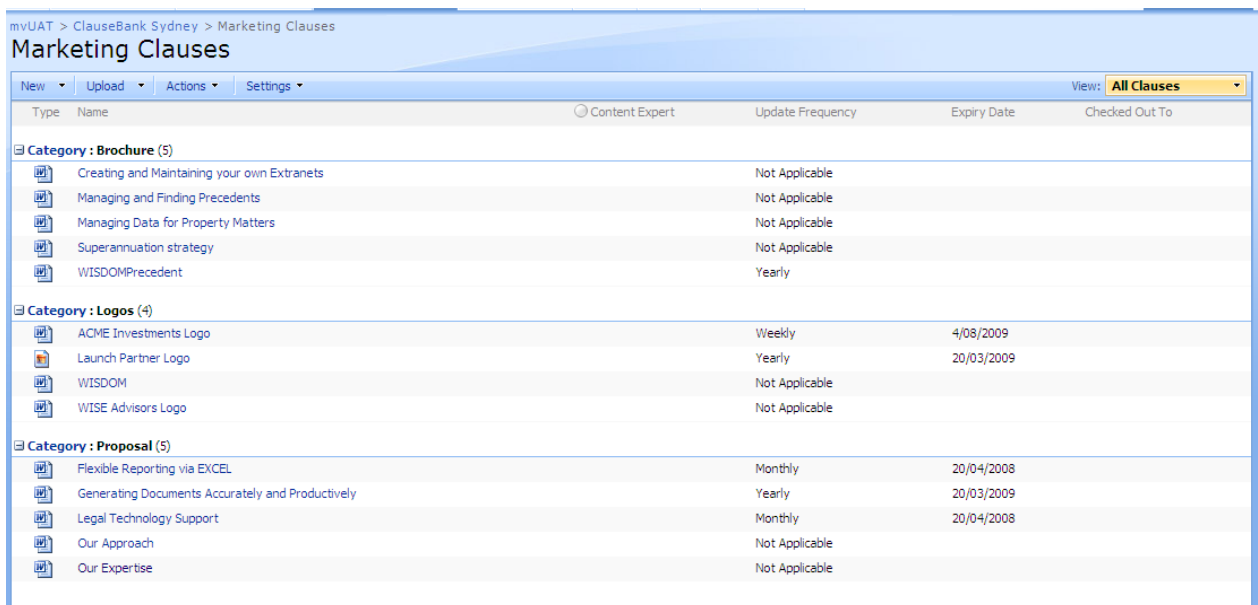


Figure 6: Categorized clauses in a document library

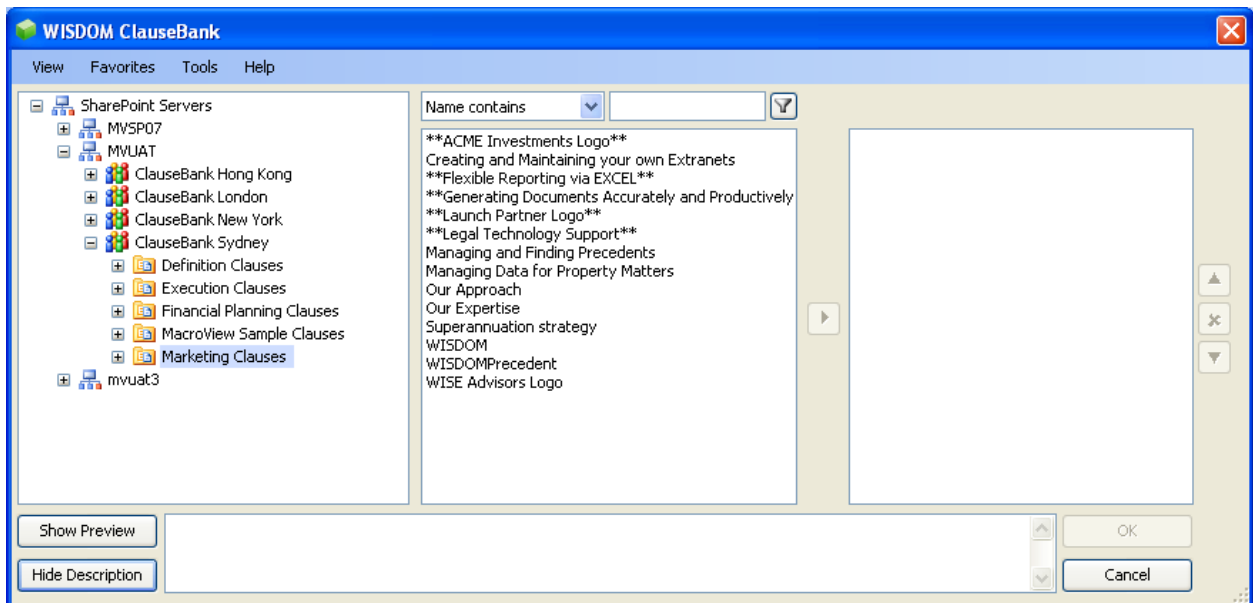


Figure 7: Example Categories on the ClauseBank screen

4.2 Creating a New Clause/Slide Library

1. From the ClauseBank site choose Site Actions, Create. Under the Libraries list choose Clause Library.
2. Type the library name ensuring that the library name ends with the word **Clauses** e.g. **Marketing Clauses** or **Slides** e.g. **Marketing Slides**. This will cause the new Library to be displayed by **MacroView ClauseBank**.

Note: A Slides library can only be seen when in PowerPoint. A Clauses Library can be seen in both Word and PowerPoint.

3. The new library should have a default view that is Grouped By category.
4. To ensure correct operation of **MacroView ClauseBank** a Clause Library must contain the following columns:
 - Name
 - Category
 - Content Expert
 - Update Frequency
 - Expiry Date
 - Checked Out To
 - ClauseLink
5. The easiest way to create a valid Clause Library is by using the library template, **Clause Library**.
6. Once the library is created you then need to set up the categories for this clause library as described in the next section.

4.3 Creating a New Category

Creating a new category on a Clause Library is done within the corresponding document library by using **Document Library Settings**.

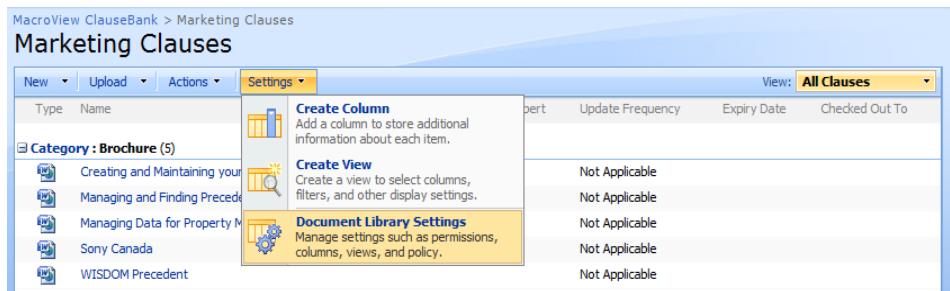


Figure 8: Modify Settings and columns

This will bring up the customize page for the document library. You will see the 'Category' column under 'Columns'.

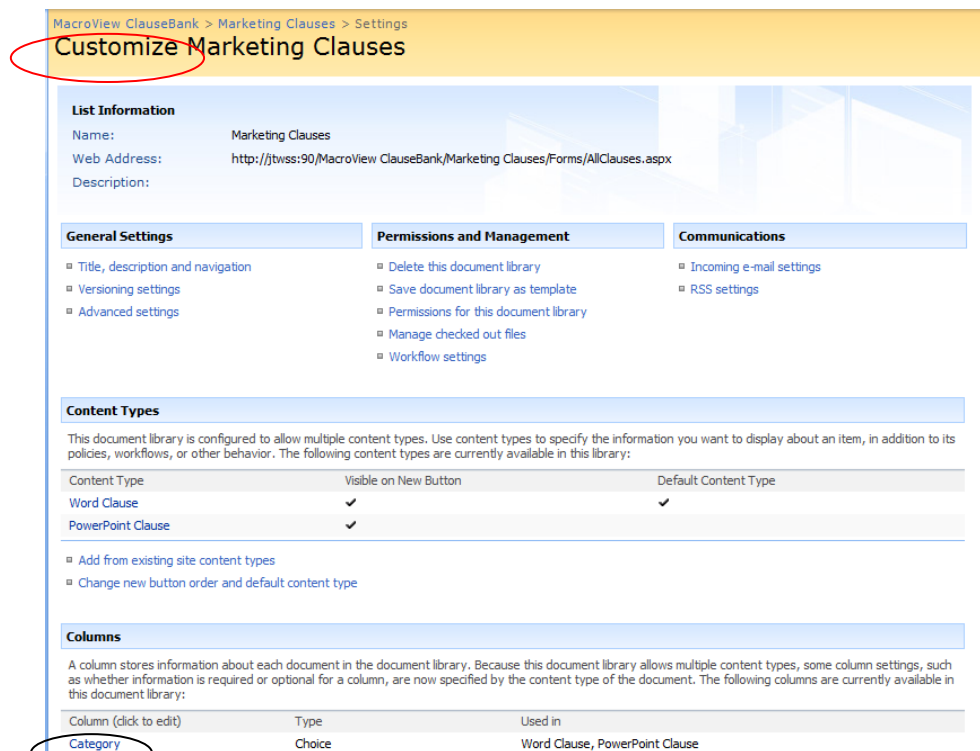


Figure 9: Customize page for the Marketing Clauses document library

Selecting 'Category' brings up an Edit page for that column, which allows you to edit, remove or add new categories. Press OK when complete, and then in this example 'Go back to "Marketing Clauses"' to return to the document library.

MacroView ClauseBank > Marketing Clauses > Settings > Edit Column

Change Column: Marketing Clauses

Use this page to edit a column of this document library.

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Type each choice on a separate line:

Brochure
Logos
Proposal
Other

Display choices using:

Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

Yes No

Default value:

Choice Calculated Value

As you load each clause into the clause library you choose the appropriate value from the category list for that library.

4.4 Adding a New Clause

New clauses can be added very easily by uploading an existing document. Locate to the appropriate document library and click 'Upload Document'.

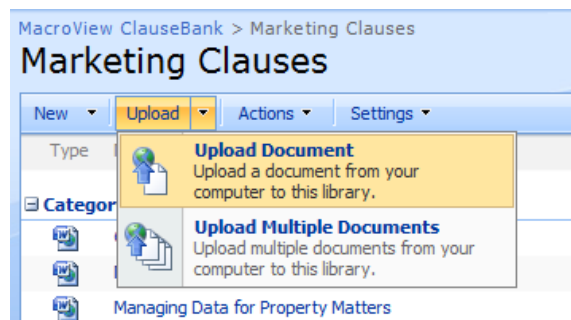


Figure 10: The Upload Document button

This displays the Upload Document screen which allows you to select a file containing the clause to be uploaded.

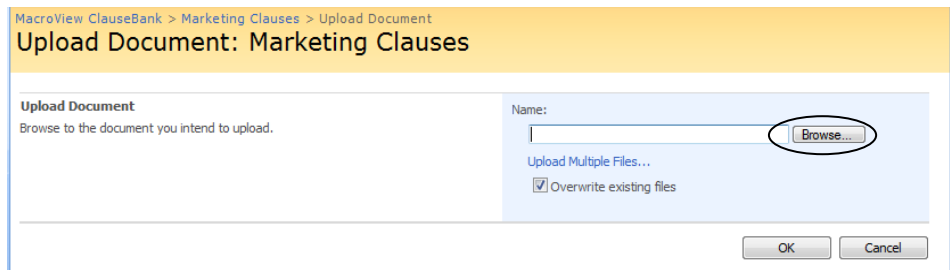


Figure 11: The upload document screen

Click Browse to select the document to be uploaded.

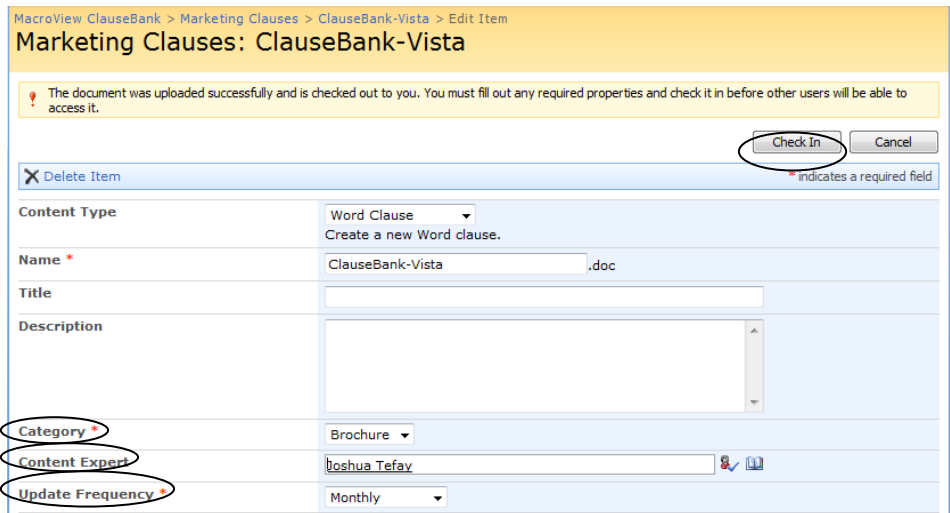


Figure 12: The check in screen

After the document has been uploaded, you must complete the 'Category', 'Content Expert' and Update Frequency fields. The Update Frequency indicates how often the clause content should be reviewed for possible update.

MacroView ClauseBank will automatically notify the Content Expert by email when the clause is due to be reviewed. If you don't want a particular clause to be reviewed set the Update Frequency to 'Not Applicable'.

The Expiry Date is set automatically by **MacroView ClauseBank** to the Current Date + the Update Frequency interval (if applicable).

Click 'Check In' and the clause is immediately available from **MacroView ClauseBank**.

4.5 Removing a Clause

Find the clause you wish to remove and select the drop down on the clause and choose 'Delete'. You will be asked to confirm this operation.

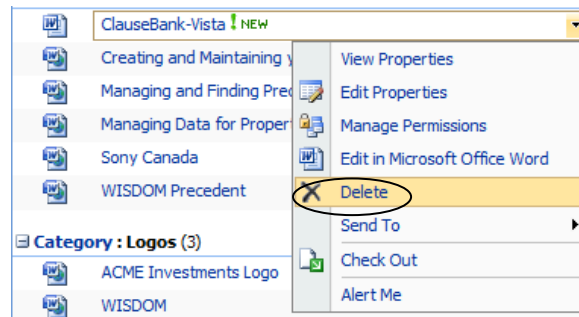


Figure 13: Deleting a clause

4.6 Removing a Library

To remove a library, first select the library. The library menu bar will display. From the 'Settings' menu choose 'Document Library Settings'. From the 'Permissions & Management' list choose 'Delete this Document Library'.

4.7 Editing a Clause

In the clause library, hover over the name of the clause. Click the edit drop down and choose 'Edit in Microsoft Word' or 'Edit in Microsoft PowerPoint' as appropriate. Note: You may wish to check out the clause file prior to editing so that it is reserved while you update. Alternatively if you have MacroView Document Management Framework installed you can use SharePoint Open to Check out and Edit the clause.

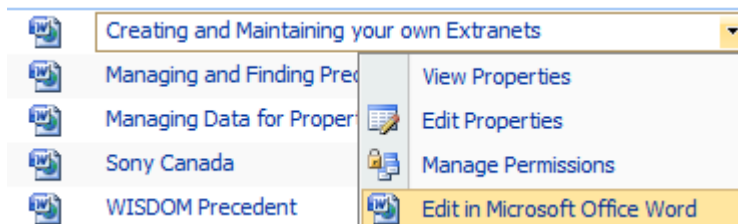


Figure 14: Example of editing a Clause in Microsoft Office Word.

4.8 Keeping clauses up-to-date

Each Clause has a content expert who is responsible for maintaining the clause. If the Update Frequency chosen for a clause is 'Weekly', 'Monthly', 'Quarterly' or 'Yearly' then an Expiry Date is automatically set using the Current Date + the Update Frequency interval. The Content Expert for that clause is notified via email seven days prior to the Expiry Date of the clause. By default an email will be sent every day until the clause is reviewed. Refer to **MacroView ClauseBank** Server Installation Notes expiry job service section to change the default email frequency.

Note that the Content Expert will continue to be notified when the clause has expired.

An expired clause is no longer valid and will not be displayed by **MacroView ClauseBank**.

Editing a clause or its properties will automatically reset the Expiry Date for that clause unless its Update Frequency is 'Not Applicable'.

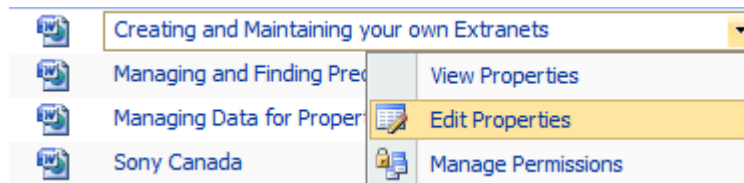


Figure 15: Editing properties of a clause

MacroView ClauseBank will automatically reset the Expiry Date and make the clause valid when Save is clicked.

4.9 Virtual Clauses¹

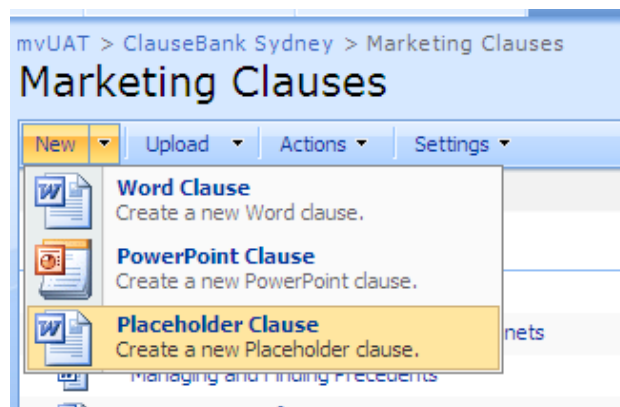
In some situations an organisation may prefer to have the same clause appearing in multiple libraries. A typical reason for this is so that users in each Department have the convenience of all the clauses they need appearing in the one Clause Library for their Department, even if some of those clauses are common across multiple Departments.

One way to achieve this is to have copies of each common clause stored in each Clause Library. The virtual clause feature of MacroView ClauseBank provides a better way. It allows the common clause to be stored and maintained in a central ClauseLibrary, but to appear in the ClauseBank menu in multiple Clause Libraries. Clauses that appear in this fashion are referred to as 'virtual clauses' and the common clauses as 'real' clauses.

The advantage of virtual clauses is that they provide convenience to the ClauseBank user, while eliminating the need to maintain separate copies of common clauses.

4.9.1 Creating a Virtual Clause

Each 'virtual' clause requires a 'placeholder' document to be created within a Clause Library. The content of a placeholder document will not be visible to the ClauseBank user, but it should be meaningful to ClauseBank administrators.



Select 'New', Placeholder Clause from the toolbar in the Marketing Clauses Library. This will create a new document in Microsoft Word ready to be completed.

¹ In earlier versions of ClauseBank virtual clauses were referred to as ClauseLinks. This was confusing with the ClauseLinks inserted into documents so was renamed. If you have clause libraries containing the ClauseLink column they are still recognised and supported by version 7 of ClauseBank for backward compatibility.

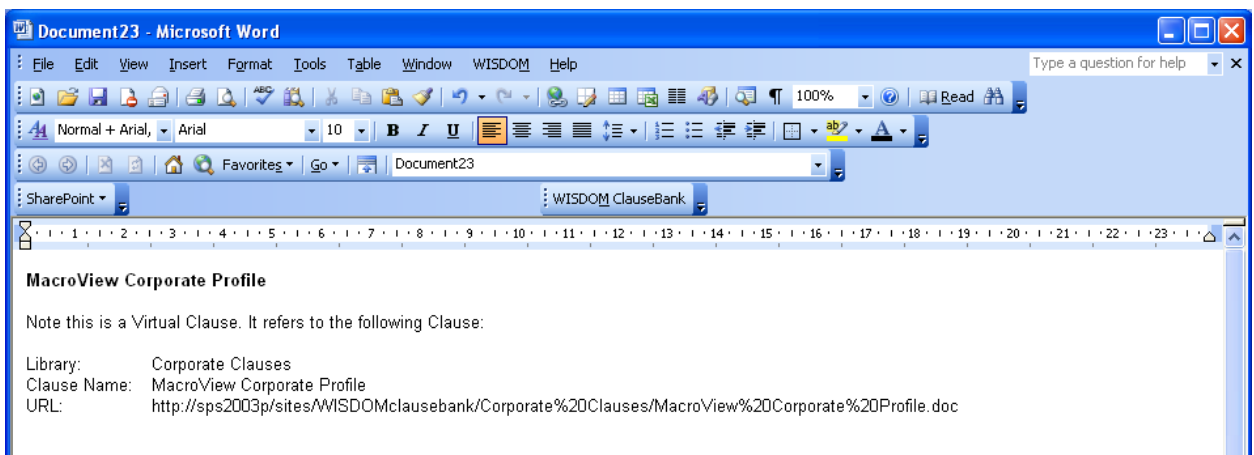
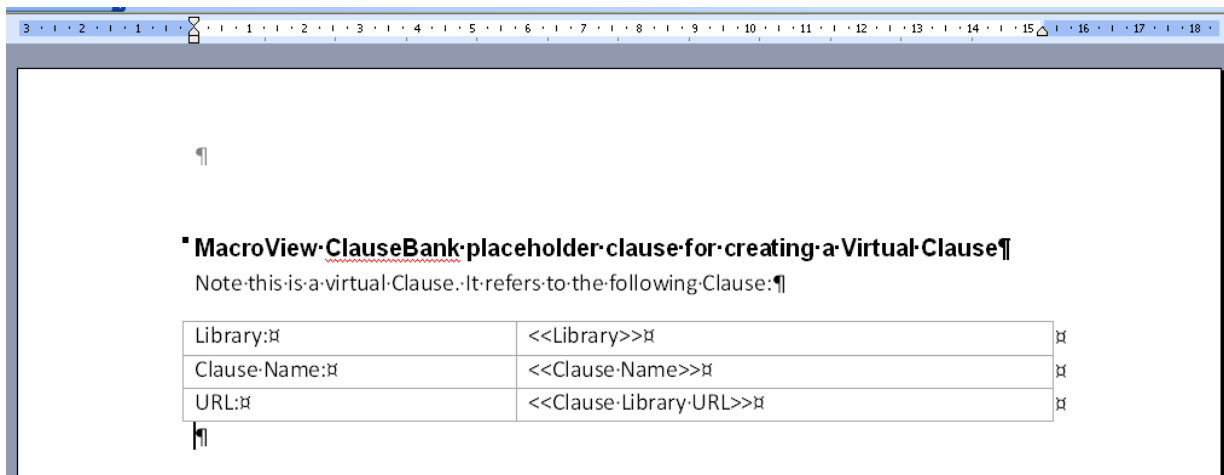


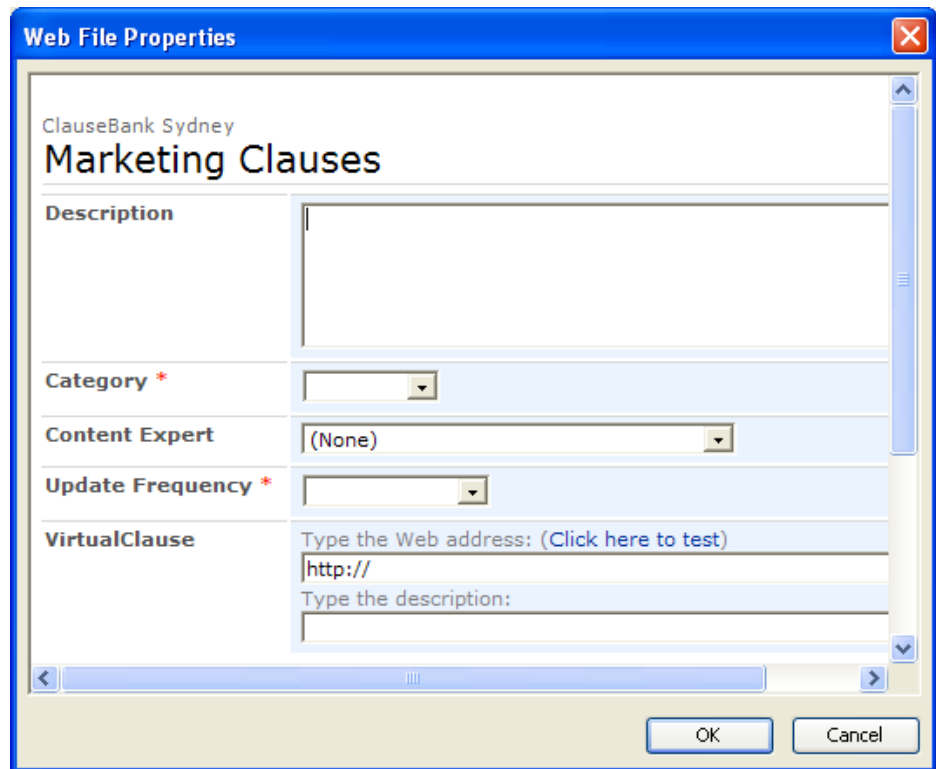
Figure 16: Sample 'Placeholder' document for Virtual Clause

Complete your new placeholder document. Choose 'File', 'Save As'. Word will automatically default to save the new document into the Marketing Clauses Library.

MacroView ClauseBank will display the name of the virtual clause (i.e. the name of the placeholder document) in the list of clauses for that Clause Library, so that name should be set accordingly.

It is possible to have multiple virtual clauses in the same library all referring to the same real document – e.g. appearing in different categories. In this case the names of each of the placeholder documents must be different (because file names must be unique within a document library).

When you click Save the profile will appear. Complete the profile.



4.9.2 VirtualClause Property

The 'VirtualClause' property of the placeholder document is set to refer to the 'real' clause in a central Clause Library. If your ClauseLibrary does not already contain a VirtualClause column, simply add a column with the name 'VirtualClause' of type 'Hyperlink or Picture'.

The VirtualClause is the URL to the Real clause. An easy way to obtain the full URL is to open the real clause in Word and have the 'Web' toolbar visible. The URL of the real clause can then be copied into the clipboard and pasted as the value of the VirtualClause column for the virtual clause.



Figure 17: Obtaining the URL of the real clause using the 'Web' toolbar in Microsoft Word

The Description you enter for the Virtual clause is displayed by **MacroView ClauseBank**.

Note that any document in a Clause Library that has a non-null value of its VirtualClause property will be treated by **MacroView ClauseBank** as a virtual clause.

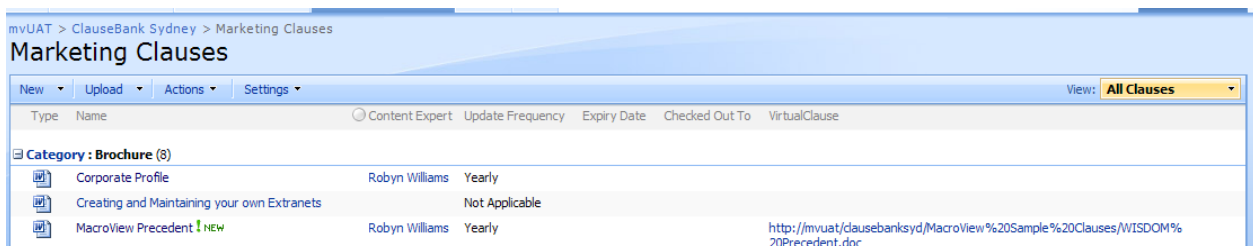


Figure 18: A clause library with a virtual clause – the VirtualClause column refers to the real clause.

You can test the path of a virtual clause at any time by editing its properties in SharePoint and clicking as circled below.

ClauseBank Sydney

mvUAT ClauseBank Hong Kong ClauseBank London ClauseBank New York **ClauseBank Sydney** Search Sites

mvUAT > ClauseBank Sydney > Marketing Clauses > MacroView Precedent > Edit Item

Marketing Clauses: MacroView Precedent

OK Cancel

X Delete Item | ABC Spelling... * indicates a required field

Content Type: Word Clause
Create a new Word clause.

Name *: MacroView Precedent .doc

Title:

Description: Precedent software functionality

Category *: Brochure

Content Expert: Robyn Williams

Update Frequency *: Yearly

VirtualClause: Type the Web address: (Click here to test)
yd/MacroView%20Sample%20Clauses/WISDOM%20Precedent.doc
Type the description:
yd/MacroView%20Sample%20Clauses/WISDOM%20Precedent.doc

Created at 21/09/2009 12:09 PM by Robyn Williams
Last modified at 21/09/2009 12:09 PM by Robyn Williams

OK Cancel

Figure 19: Testing a virtual clause URL for real clause

4.9.3 Previewing and Retrieving Virtual Clauses

In the **MacroView ClauseBank** display screen Virtual Clauses are listed in exactly the same manner as any other clause. However if the user clicks the name of a virtual clause, **MacroView ClauseBank** will display the content of the 'real' clause, rather than the 'virtual' clause. Similarly if the virtual clause is retrieved, **MacroView ClauseBank** will retrieve and insert the content of the 'real' clause, rather than that of the 'virtual' clause.

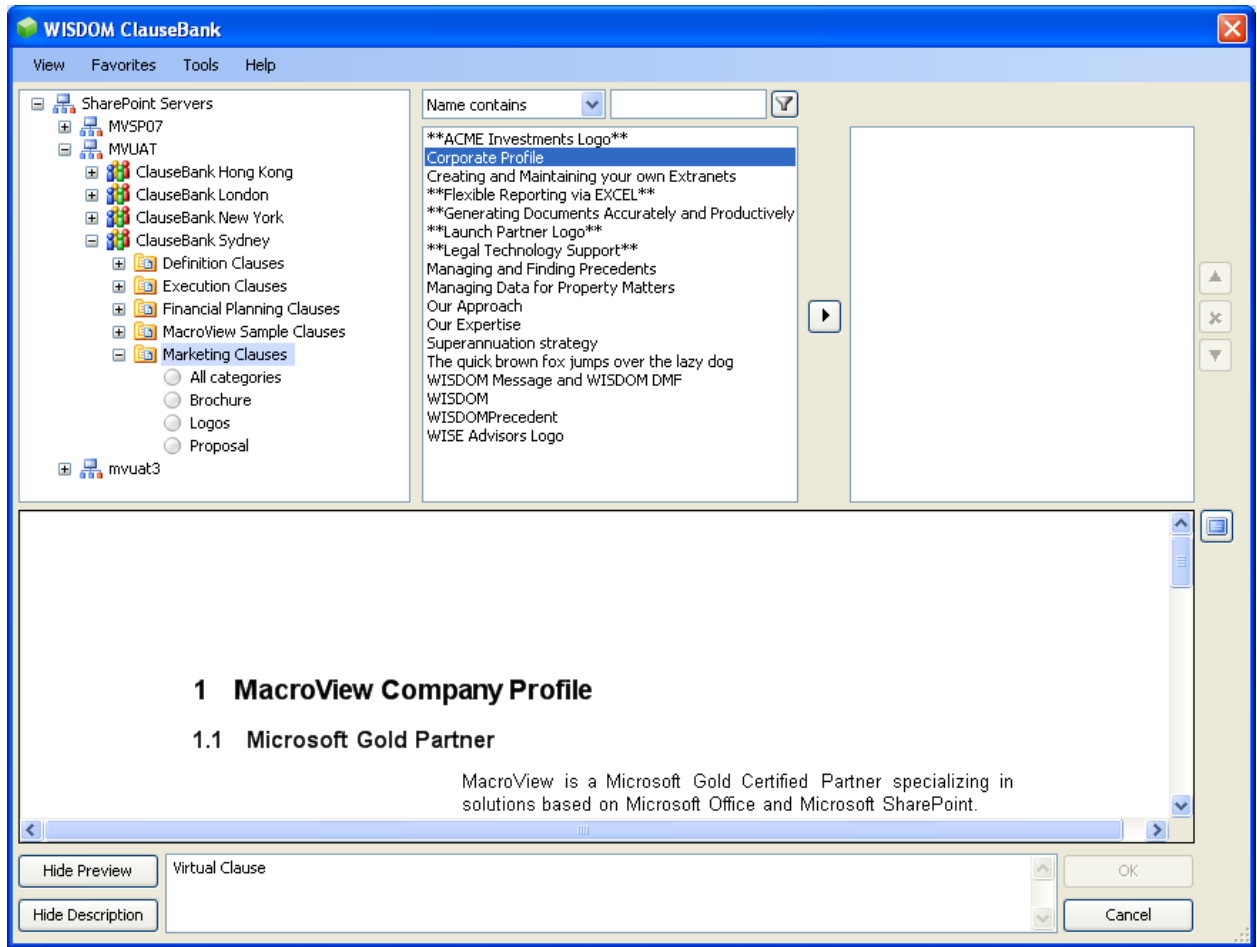


Figure 20: MacroView displays the content of the real clause referenced by VirtualClause and the virtual clause description

If you attempt to preview a virtual clause that has an invalid URL, MacroView will display the following error message in the Preview pane.

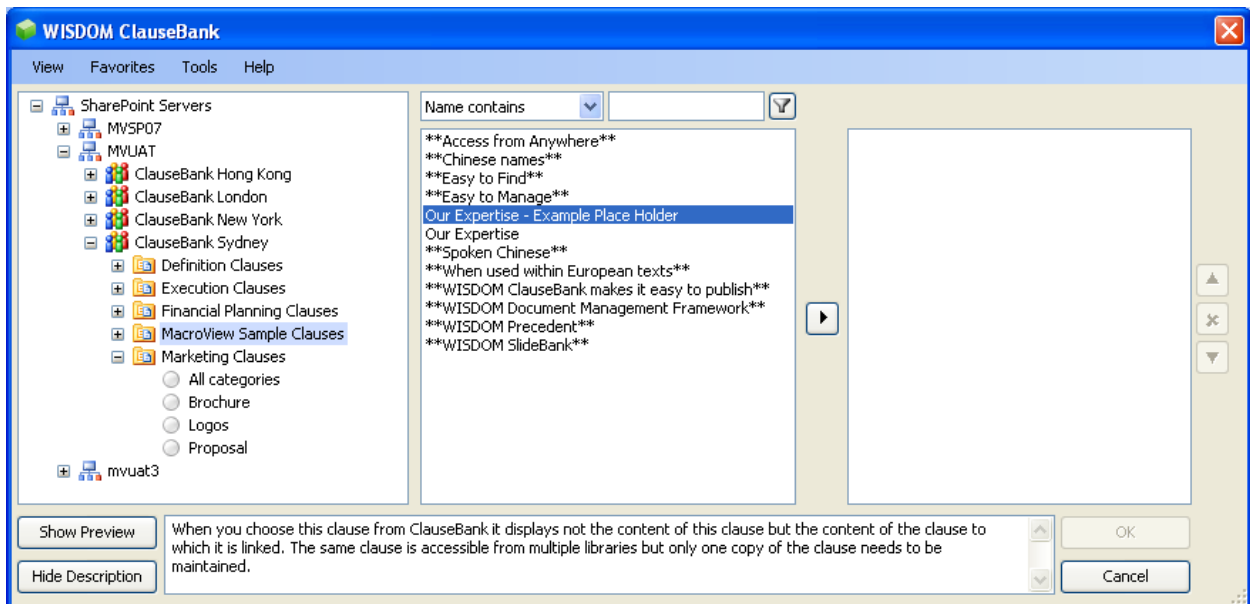


Figure 21: Error on use of a virtual clause with invalid URL for real clause

5 Creating a template for ClauseBank

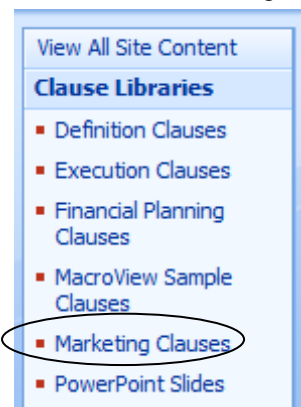
This section describes how to create and install a template containing your organisations documents styles which can then be used to create a new clause.

Open your companies' standard template for the type of document you want to create. In this example Marketing.dot contains all the correct styles/formatting for the marketing department.

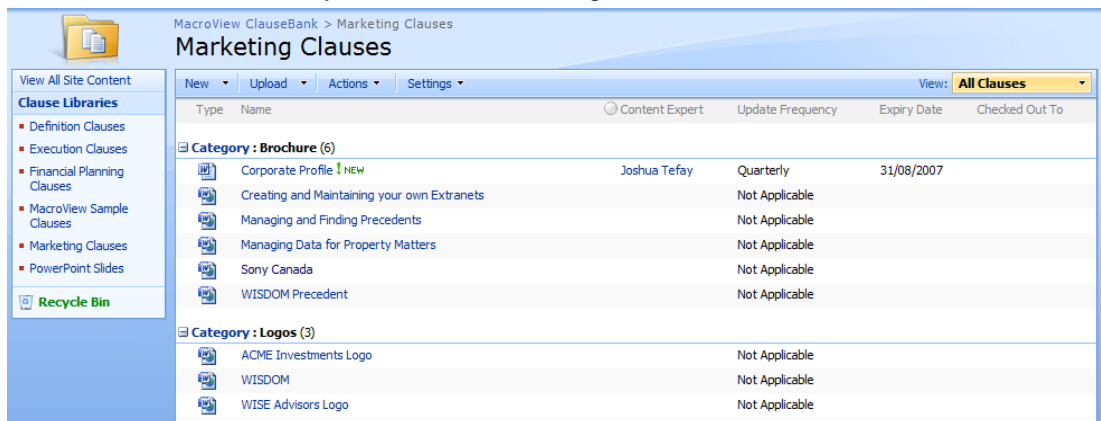
1. Open Marketing.dot using Microsoft Word.
2. Use 'Edit', 'Select All' and press Delete. This will clear out all the text. Make sure there are no multiple blank pages.
3. Save this file as a '.doc' file (Marketing.doc) or '.docx' file (Marketing.docx).

Now upload this Marketing document into the appropriate ClauseBank Library so that new documents created can be easily based on this file. To do this:

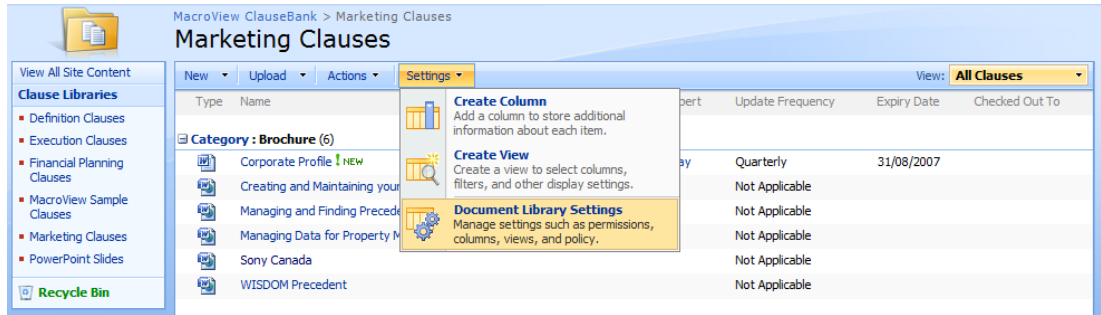
4. Navigate to your ClauseBank site and select your library. In this example choose Marketing Clauses.



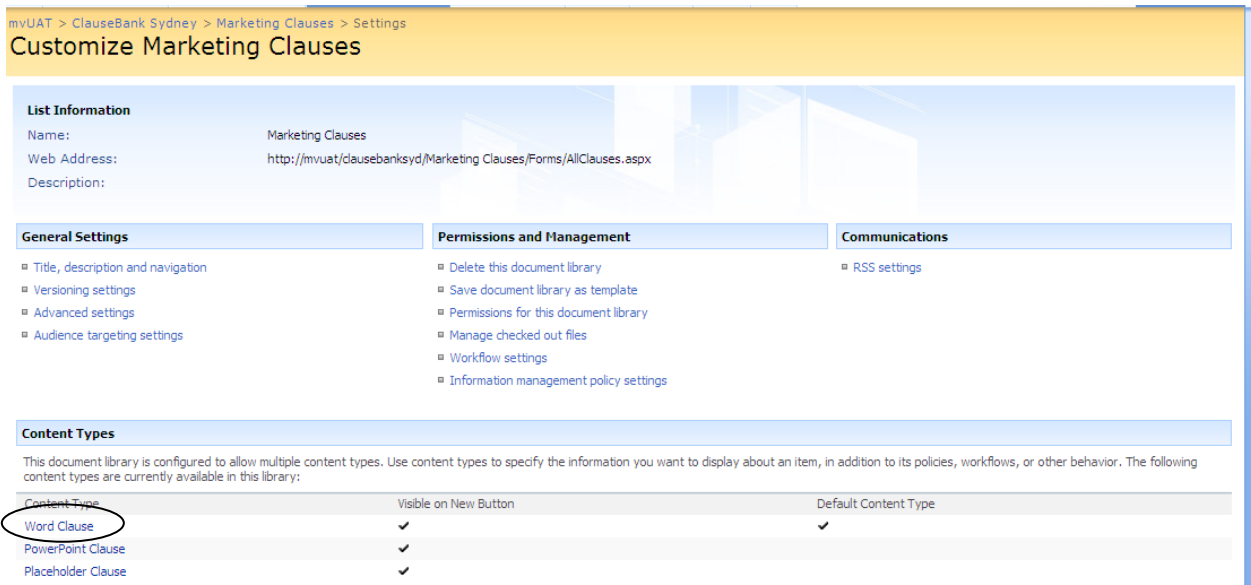
5. The library will show all the categories/clauses:



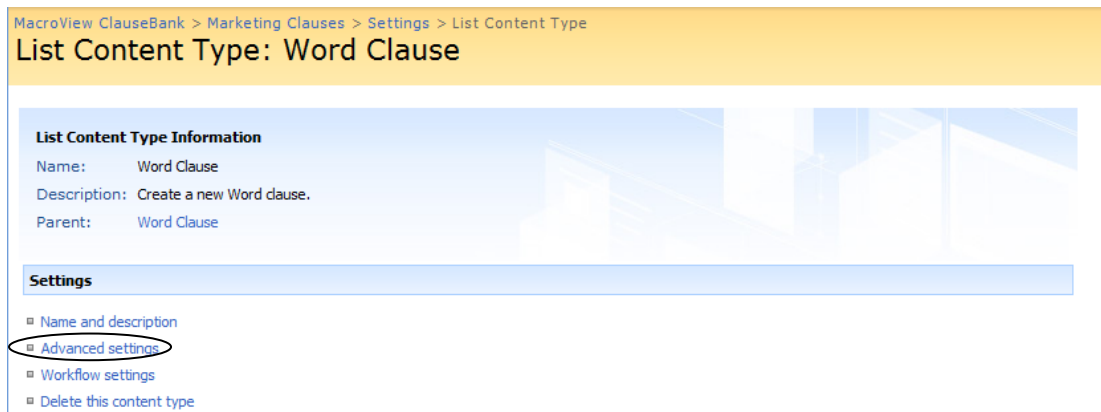
6. Then edit the document library settings.



7. From the document library 'Customize' page, select the type of clause you would like to change the template for under the 'Content Types' heading. In this case the Content Type is 'Word Clause'.



8. Next, on the 'List Content Type' page, click the Advanced Settings link. The List Content Type Advanced Settings screen allows you to change the document template for the selected clause content type (in this example, Word Clause).



9. Select the 'Upload a new document template' radio button and Browse to locate the Marketing file saved earlier. Click OK to upload the template.

MacroView ClauseBank > Marketing Clauses > Settings > List Content Type > Advanced Settings

List Content Type Advanced Settings: Word Clause

Use this page to change advanced settings for this content type.

Document Template Specify the document template for this content type.	<input type="radio"/> Enter the URL of an existing document template: <input type="text" value="template.doc"/> (Edit Template)
	<input checked="" type="radio"/> Upload a new document template: <input type="text"/> <input type="button" value="Browse..."/>
Read Only Choose whether the content type is modifiable. This setting can be changed later from this page by anyone with permissions to edit this type.	Should this content type be read only? <input type="radio"/> Yes <input checked="" type="radio"/> No

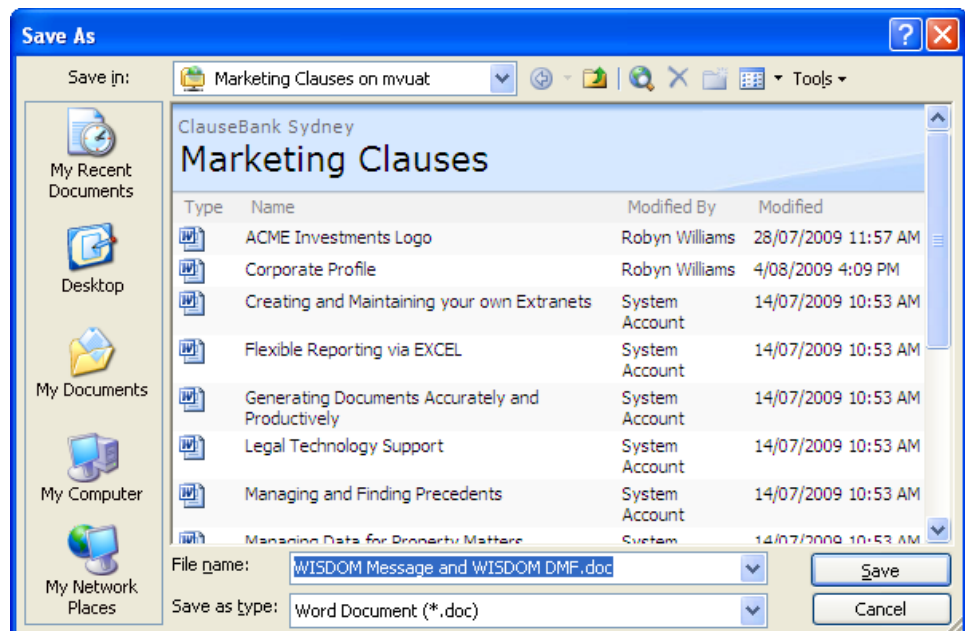
6 Using a template to create clauses

This section shows how to use a clause template to create a new Clause and add it to the Clause Library.

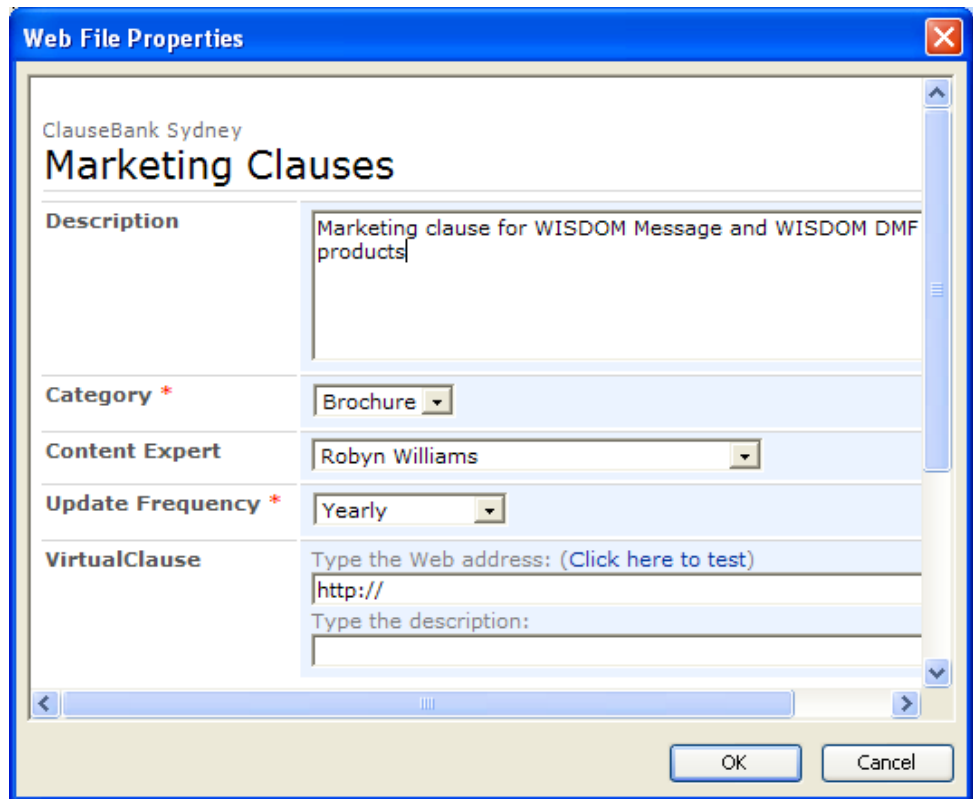
1. Select 'New', Word Clause from the toolbar in the Marketing Clauses Library. This will create a new document in Microsoft Word.



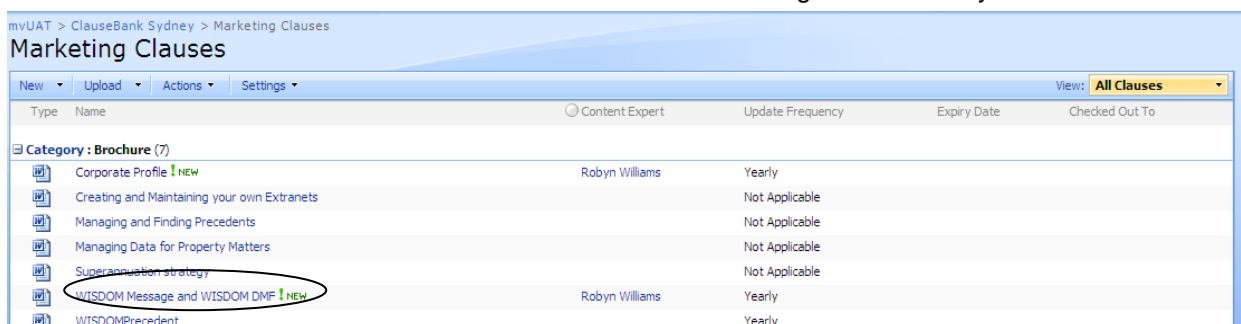
2. Complete your new clause document. Choose 'File', 'Save As'. Word will automatically default to save the new clause into the Marketing Clauses Library.



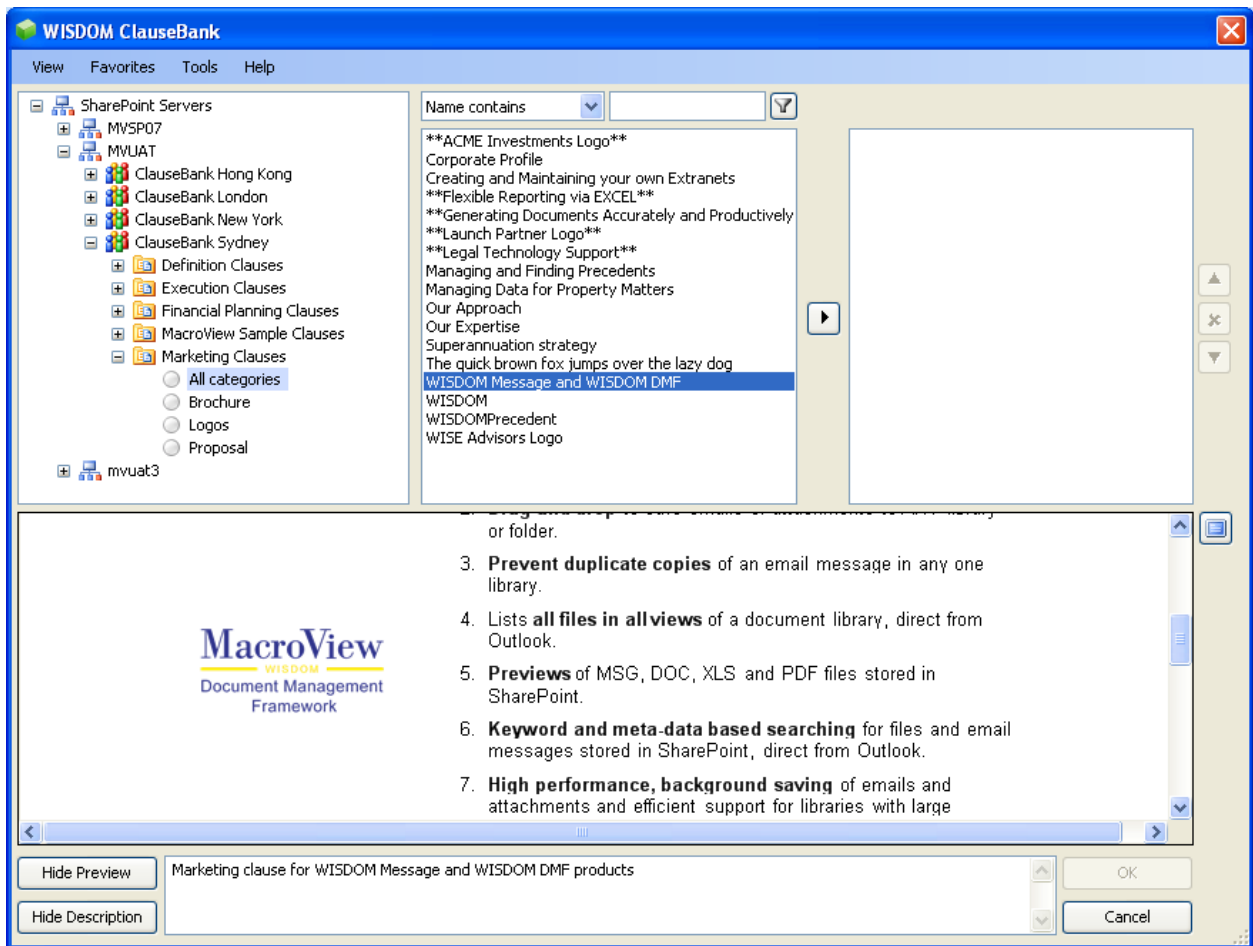
After pressing the 'Save' button, the Clause profile will display. Complete the profile and click OK. The clause is then immediately available from ClauseBank. The Description you enter for the clause is displayed by **MacroView ClauseBank**.



- Alternatively you can save the clause document locally and then upload it by choosing 'Upload' from the menu bar in the Marketing Clauses library and browsing to the local copy of the file.
- Either process will result in a new Clause being saved to the Clause library. In this example a new clause called 'MacroView Message and MacroView DMF' is now available in the Marketing Clause Library.



If you switch back to Microsoft Word now, and use **MacroView ClauseBank**, you can see the new clause.



7 File types supported

Clauses are stored as documents and files in Document Libraries within Microsoft SharePoint sites. **MacroView ClauseBank** allows clauses to be stored in a range of formats.

7.1 Word and Outlook

In Microsoft Word and Outlook, **MacroView ClauseBank** supports clauses in a number of file formats including:

- .doc
- .docx
- .jpg
- .gif
- .png
- .mhtml
- .mht

Unsupported file formats will not appear in ClauseBank.

If you want to insert clauses in '.docx' format into Word 2003 you must have the Microsoft Office Compatibility Pack installed. If the ClauseBank Tools, Options, Preferences, **Allow '.docx' clauses in Word 2003** setting is ticked, ClauseBank will display clauses in '.docx' format. If this option is not checked they will not display in Word 2003. We recommend not ticking this option if the Compatibility Pack is not installed.

When you insert a clause in '.docx' format in Word 2003 the following message will display.

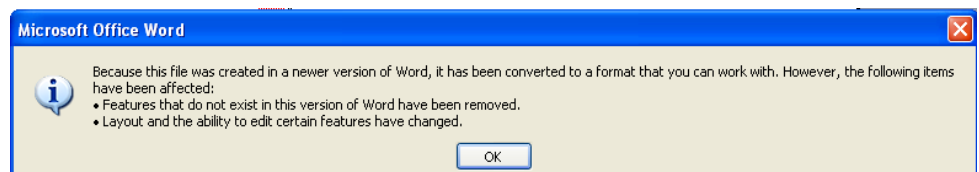


Figure 22: Warning message when insert '.docx' file type into Word 2003.

7.2 PowerPoint

In Microsoft PowerPoint, **MacroView ClauseBank** supports clauses of file type:

- .mhtml
- .mht
- .jpg
- .gif
- .png

Note that Microsoft PowerPoint presentations cannot be inserted into a Microsoft Word document. Clauses that have been created in Microsoft PowerPoint not will appear in the ClauseBank screen when in Microsoft Word.

When in Microsoft PowerPoint, clauses that are in graphic format such as .jpg will be available for selection and insertion, in addition to slides and sets of slides created in Microsoft PowerPoint.

8 Troubleshooting

8.1 File Type Conversion

If the following message appears when using **MacroView ClauseBank** you will need to uncheck the 'Confirm conversion at Open' option in Word, Tools, Options, General.

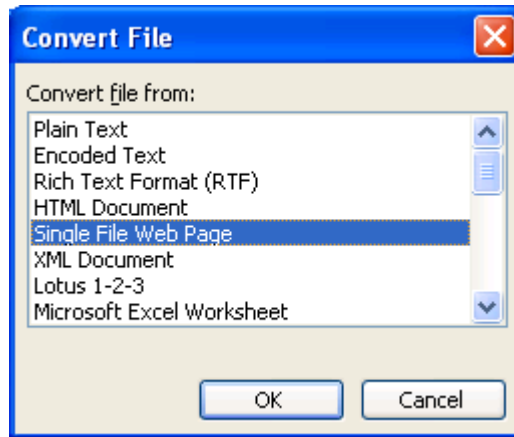


Figure 23: Convert file message

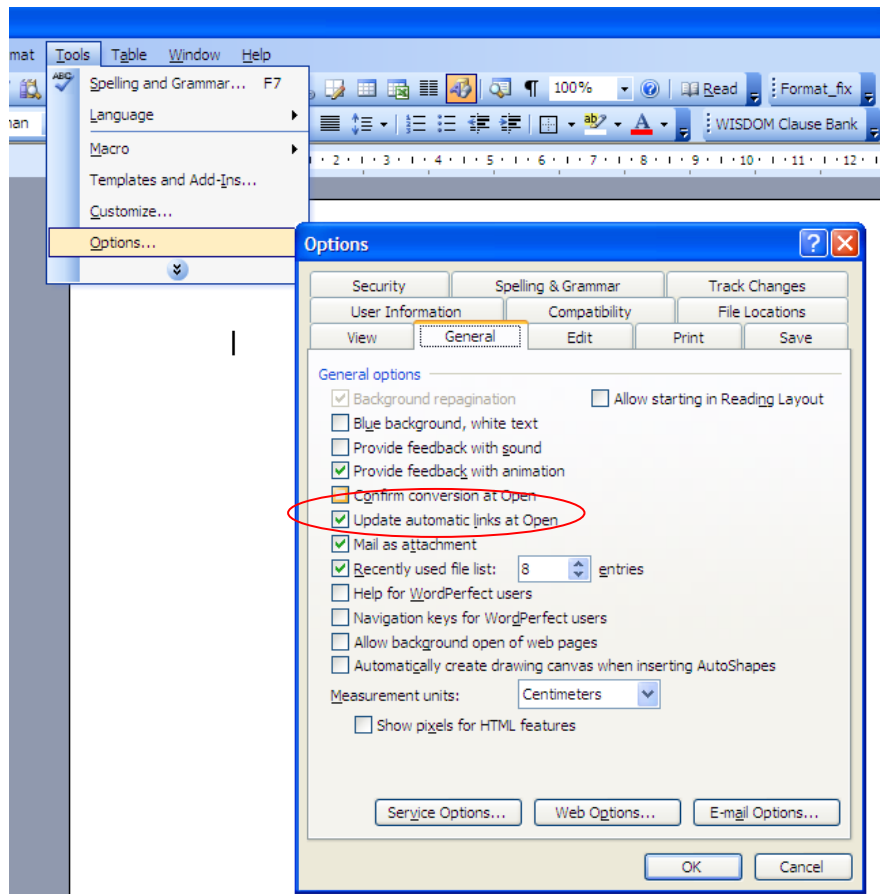


Figure 24: Confirm conversion at Open

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