

# Managing MacroView 365 and Client Side Only Licences

User guide

3 March 2017

Commercial in confidence

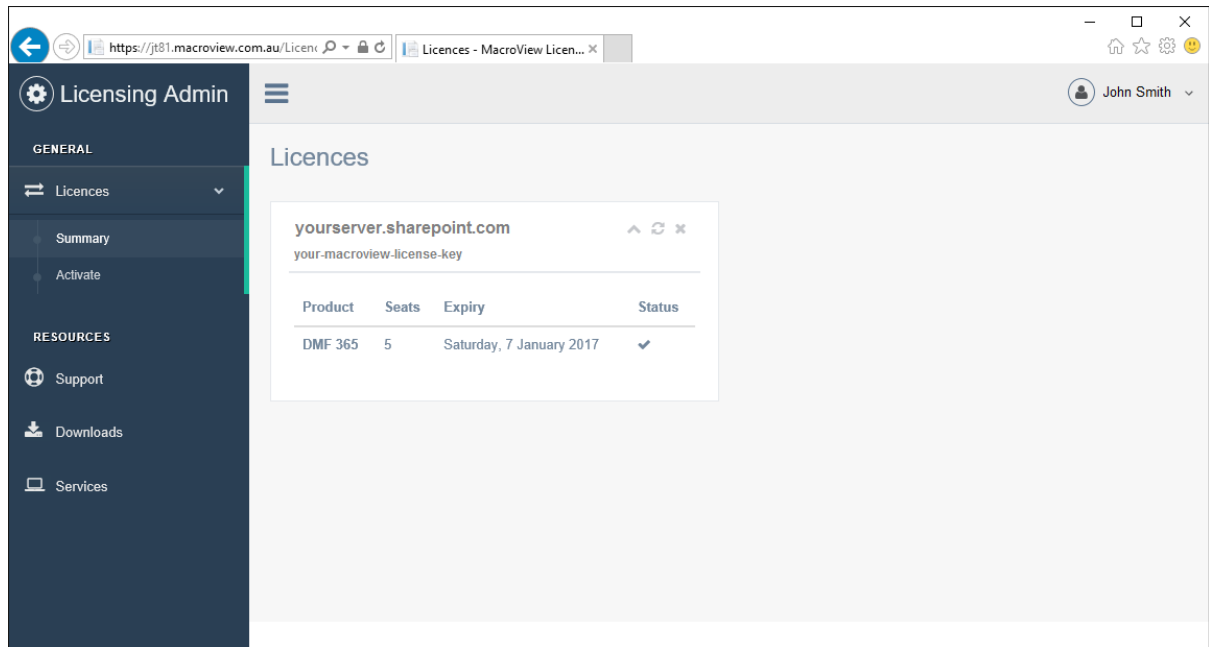
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# 1. Introduction

The MacroView Licensing website provides information on the product name, seat count, expiry date and status of every MacroView product associated with your MacroView Licensing website account. It also provides links to useful resources such as support, downloads and services.



The MacroView Licensing website is used to manage licences for MacroView products that support use with SharePoint on-premises in Client Side Only (CSO) mode or with SharePoint Online. To use these products, all that's required is the installation of the respective client software and activation of the licence using a licence key provided by MacroView.

If you do not already have a MacroView Licensing website account, you will be prompted to create one when you first access the licensing website home page or when you first attempt to activate a licence from the MacroView DMF or MacroView Message client. Refer section 2 of this document for details on creating a new account.

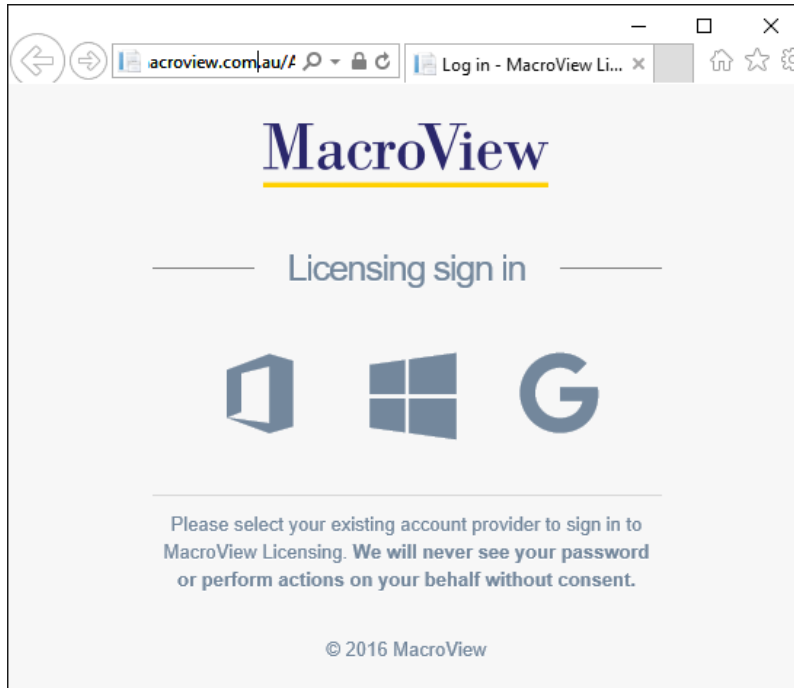
The following MacroView products currently support use with SharePoint Online / Client Side Only.

Product	Client Side Only	SharePoint Online
MacroView DMF / Message	✓	✓
MacroView DMF 365 / Message 365	✓	✓
MacroView UDN/AOI <sup>1</sup>	✓	✓
MacroView ClauseBank		✓

<sup>1</sup> UDN/AOI requires that MacroView DMF or MacroView Message are running in Client Side Only or SharePoint Online mode.

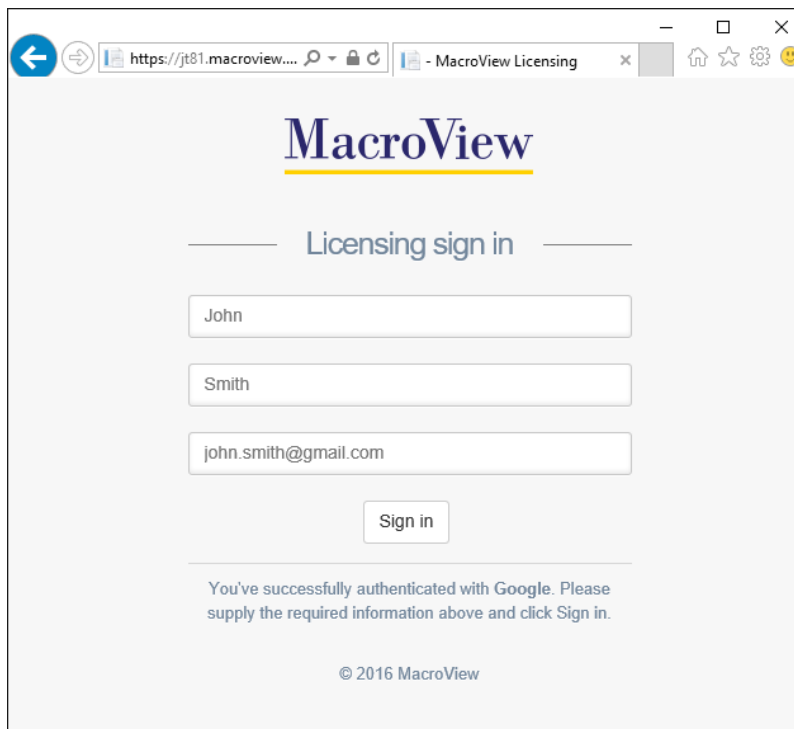
## 2. Creating a MacroView Licensing website account

When you first log in to the MacroView Licensing website you will be prompted to select either your *Office 365*, *Microsoft* or *Google* account to associate with your MacroView Licensing website account.



- Click a button to register with any of your *Office 365*, *Microsoft* or *Google* account credentials.

Note: You will be prompted by the relevant account provider to trust the MacroView Licensing site. **You must grant this access in order to register the account.**



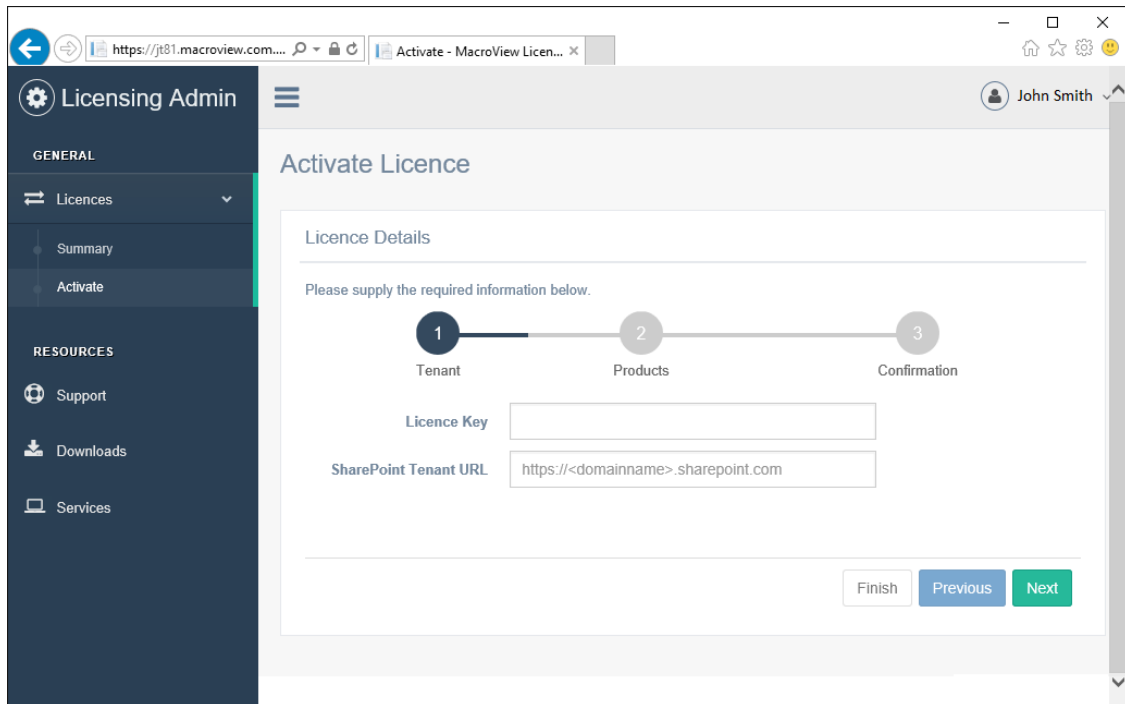
- Click *Sign-in*

### 3. Activating a new licence

**Note: Client Side Only licences must be activated via the MacroView DMF or MacroView Message client via the Options > Servers dialog (refer section 4 of this document)**

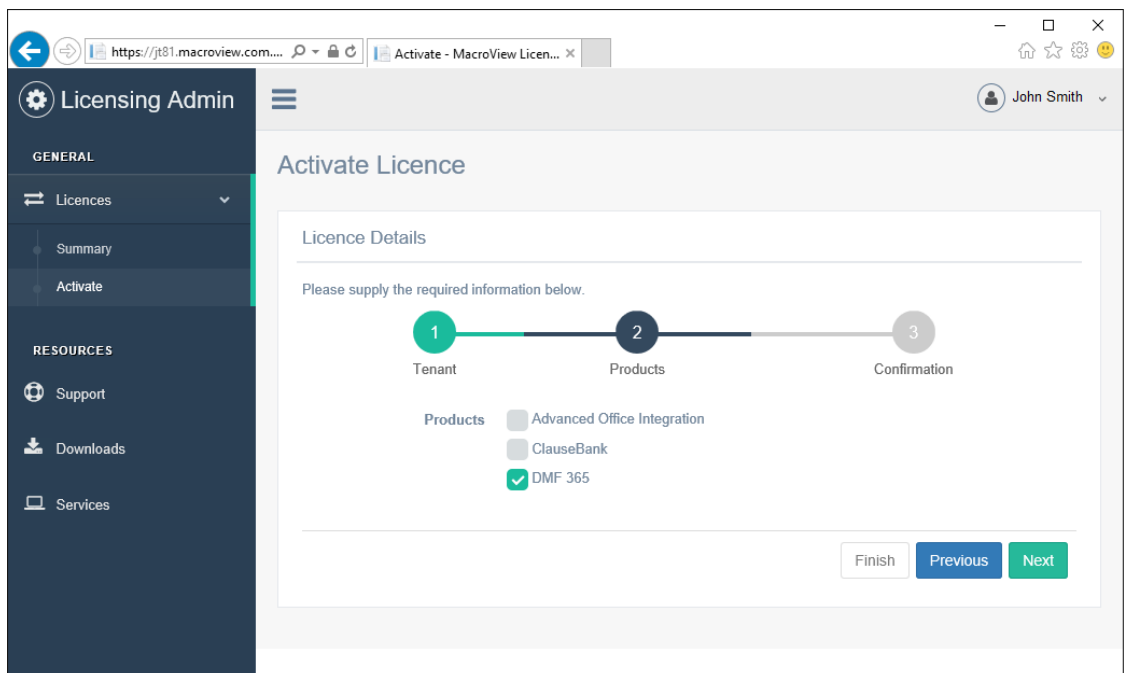
To activate a licence from the MacroView Licensing website:

- Log into the MacroView Licensing website.
- Select *Licences Activate*.



The screenshot shows the 'Activate Licence' page in the MacroView Licensing Admin interface. The left sidebar contains 'GENERAL' (Licences, Summary, Activate) and 'RESOURCES' (Support, Downloads, Services). The main content area has a progress bar with three steps: 1. Tenant, 2. Products, and 3. Confirmation. Step 1 is active. Below the progress bar, there are input fields for 'Licence Key' and 'SharePoint Tenant URL' (pre-filled with 'https://<domainname>.sharepoint.com'). At the bottom right, there are 'Finish', 'Previous', and 'Next' buttons.

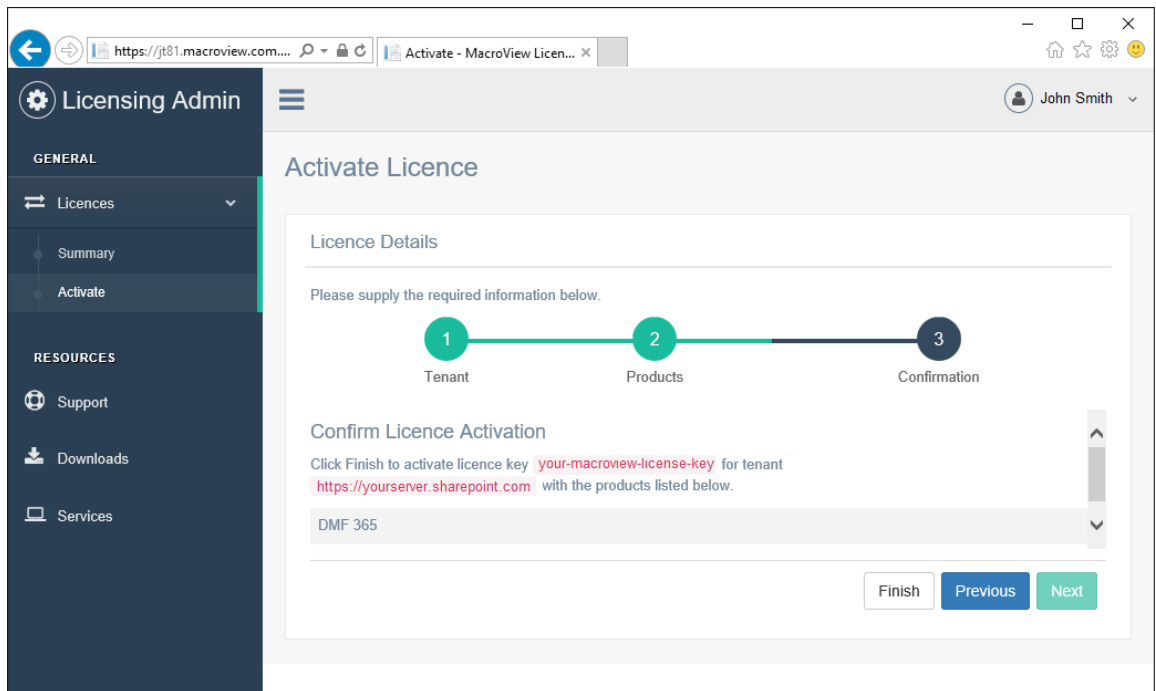
- Enter the Licence Key provided by MacroView and the SharePoint Tenant URL then click *Next*.



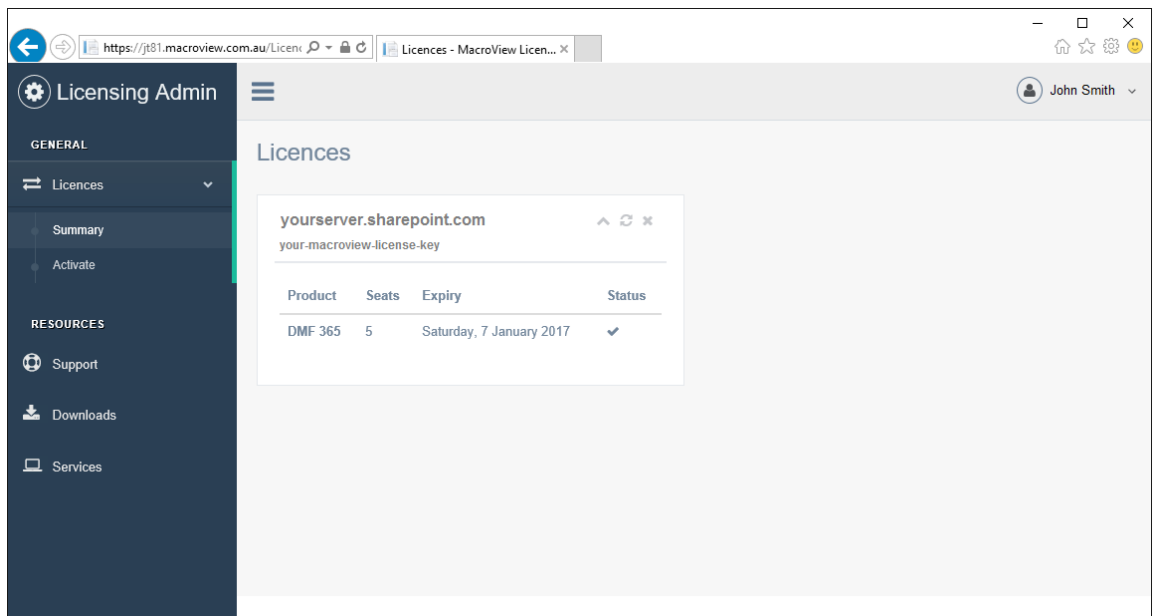
The screenshot shows the 'Activate Licence' page in the MacroView Licensing Admin interface. The left sidebar contains 'GENERAL' (Licences, Summary, Activate) and 'RESOURCES' (Support, Downloads, Services). The main content area has a progress bar with three steps: 1. Tenant, 2. Products, and 3. Confirmation. Step 2 is active. Below the progress bar, there are three product selection options: 'Advanced Office Integration', 'ClauseBank', and 'DMF 365' (which is selected with a checkmark). At the bottom right, there are 'Finish', 'Previous', and 'Next' buttons.

- Select which products to activate (at least one product must be selected).

- Click *Next*



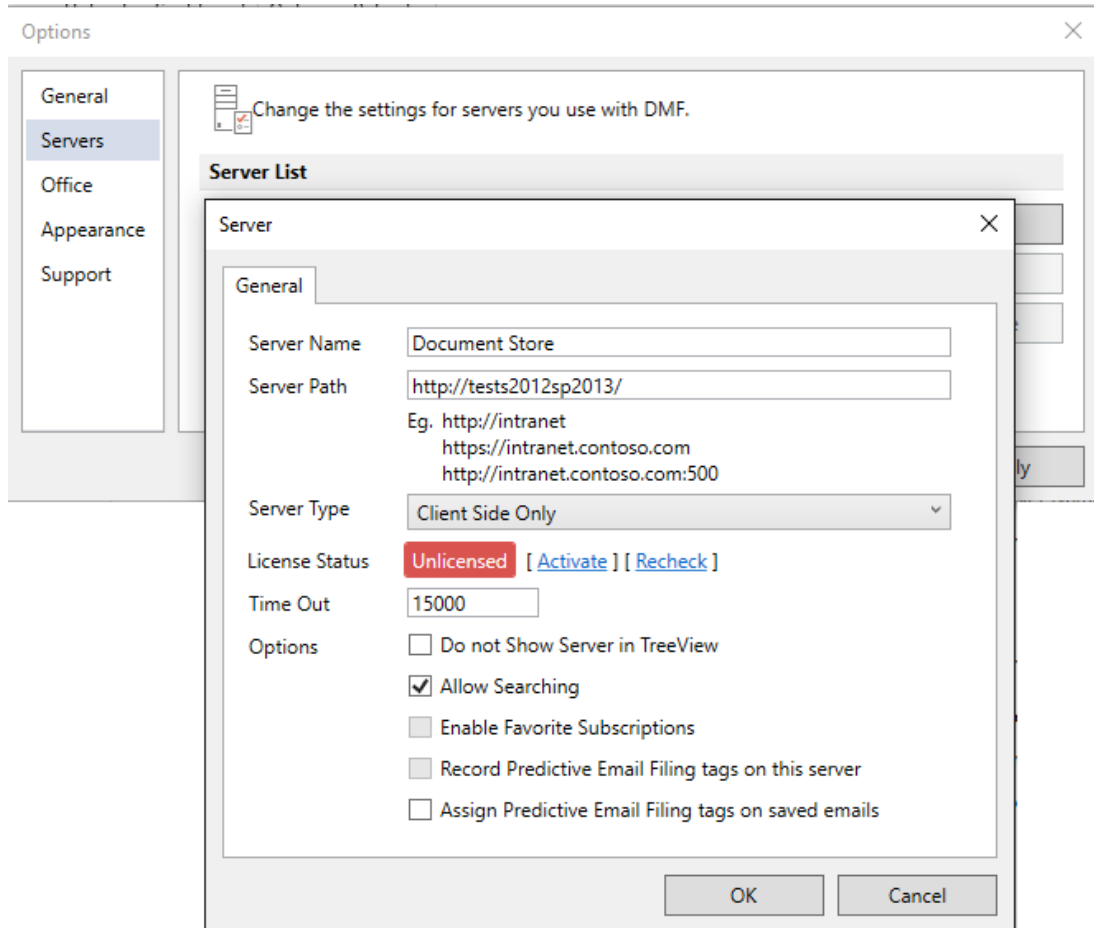
- Confirm the licence activation details and click *Finish*.
- You will be returned to the *Licences, Summary* page where the new licence details will be listed.



## 4. Activating a licence from the MacroView DMF Client

To activate a Client Side Only or SharePoint Online licence key from the DMF client:

- Start MacroView DMF or MacroView Message and Open the Options > Servers dialog.
- Click *Add* and select 'Client Side Only' from the *Server Type* dropdown menu.



- Enter a *Server Name* and *Server Path* .
- The *Licence Status* indicator will update automatically to show if the server is licenced.

**Unknown**

The Server Path you have entered is incorrect or not reachable. **Note you must have at least read access to the entered sever path to activate the licence.**

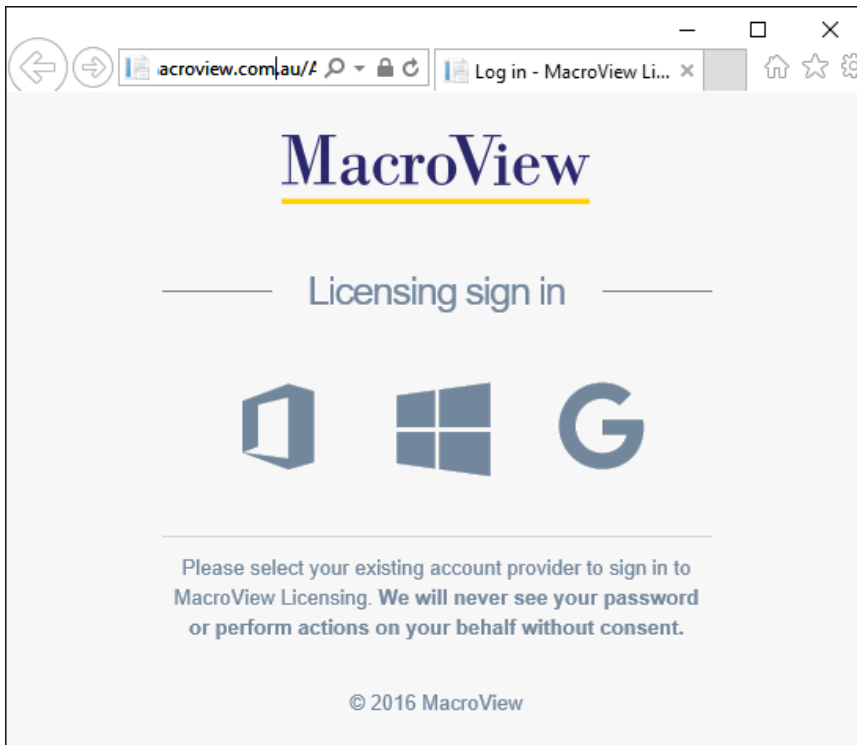
**Licensed**

The server is already licenced.

**Unlicensed**

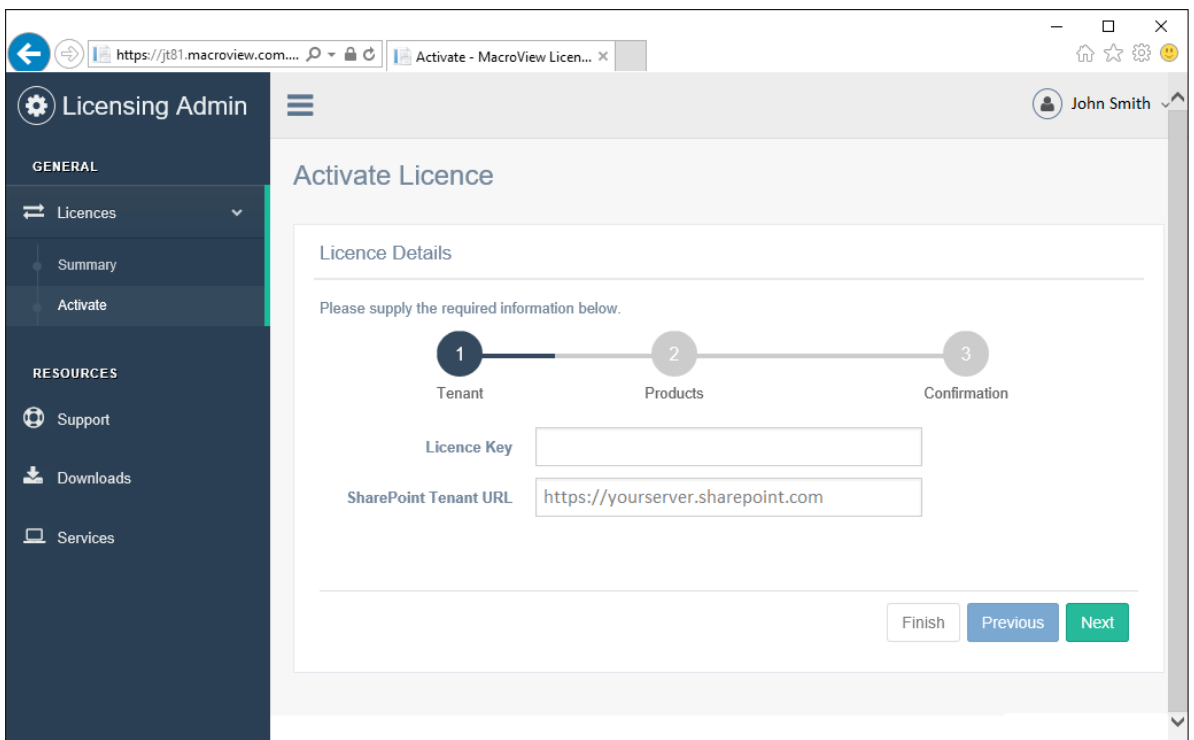
The server has not yet been activated on the MacroView Licensing website. Additional options to *Activate* and *Recheck* are shown.

- Click *Activate*.
- The MacroView Licensing website will open in your browser and prompt you to login or create a new MacroView Licensing Account with any of your *Office 365*, *Microsoft* or *Google* account credentials.



Note: If the account has not previously been used to log into the MacroView Licensing website you will be prompted by the relevant account provider to trust the MacroView Licensing site. **You must grant this access in order to register the new account.** You will then be prompted to provide your name and email address to complete the account creation (refer section 2 for more information on creating a new account).

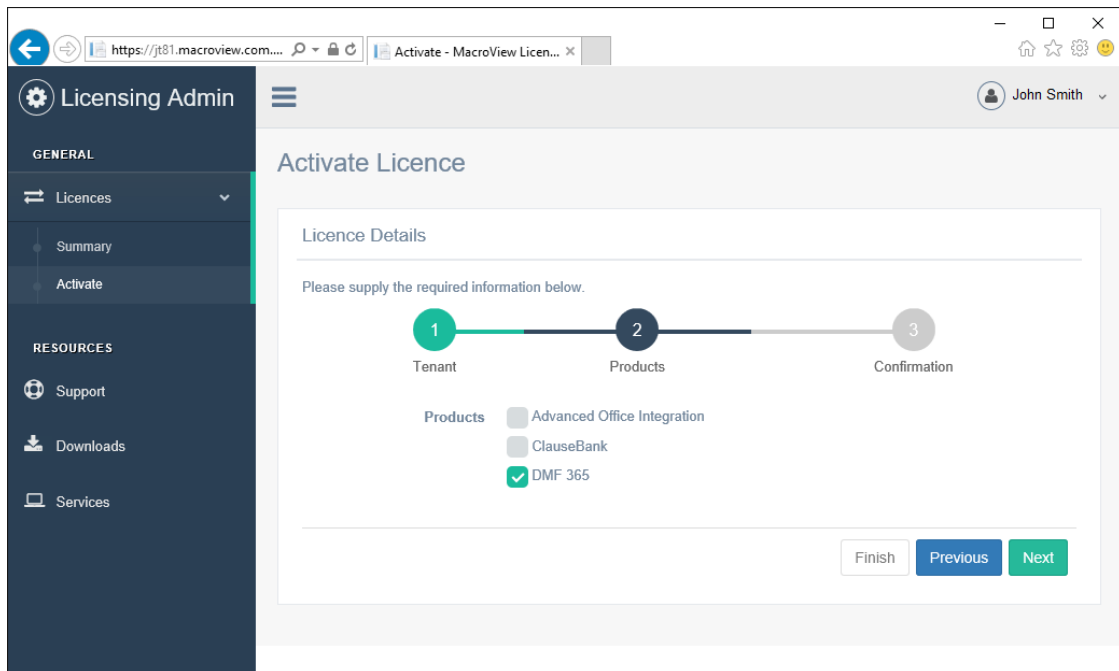
- After you have signed in, the licence activation page will be shown.



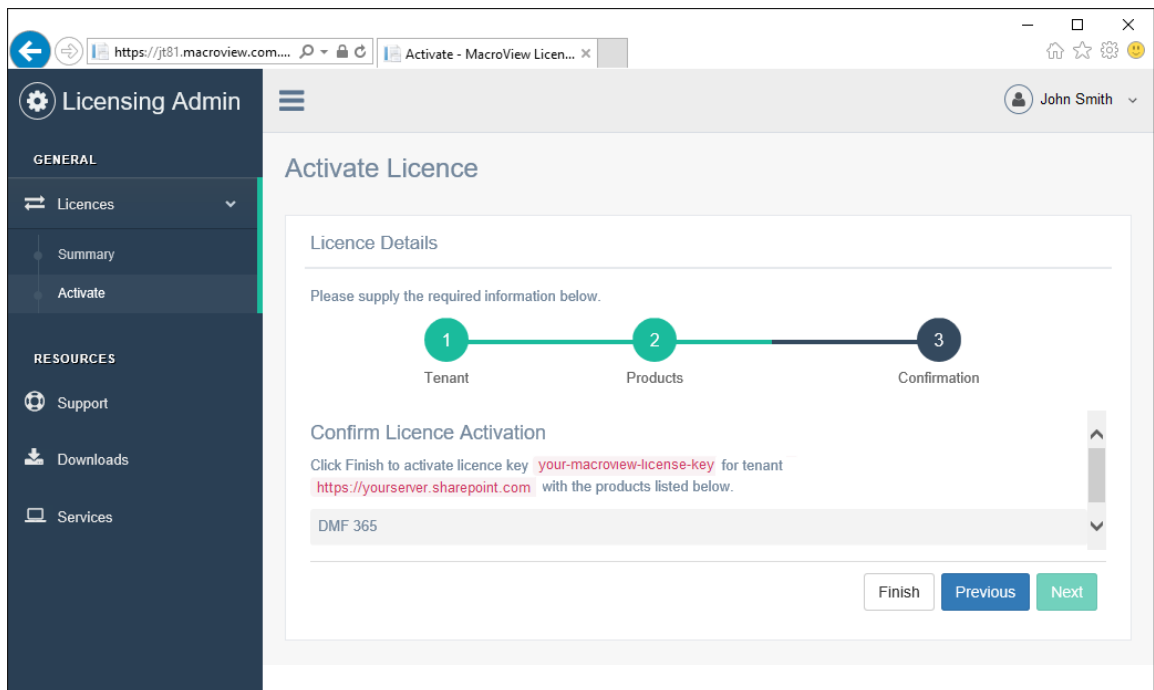
- Enter the Licence Key provided by MacroView.
- The *SharePoint Tenant URL* field will already be populated with the server name entered in the server DMF server dialog.



- Click *Next*.



- Select which products to activate (at least one product must be selected).
- Click *Next*.

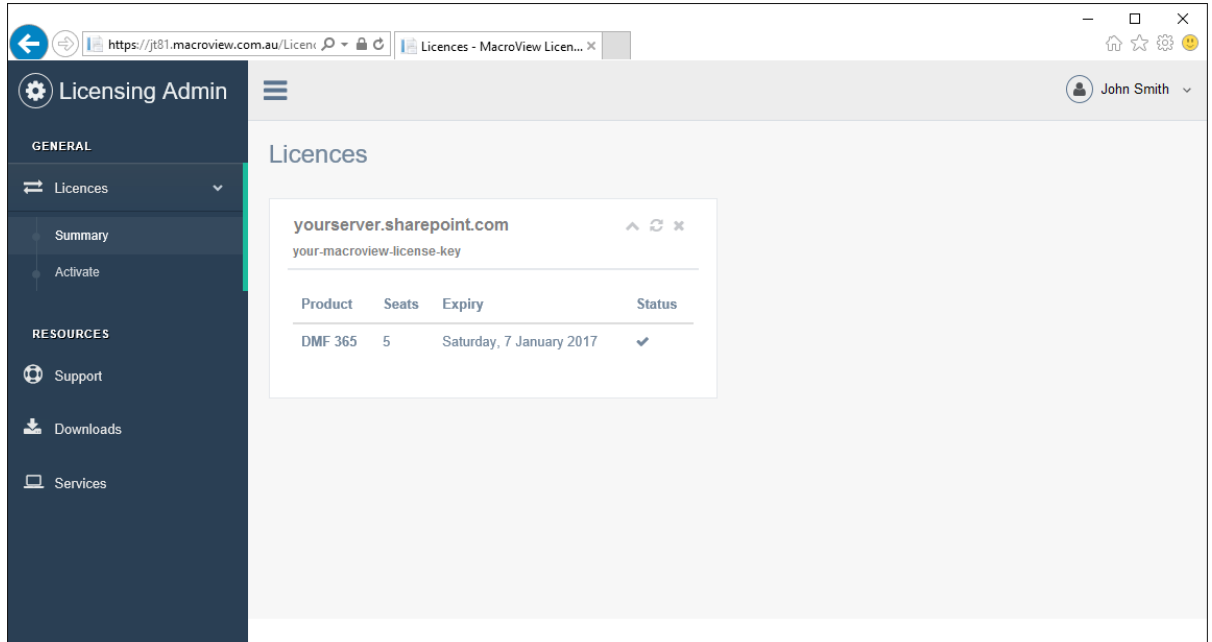


- Confirm the licence activation details and click *Finish*.

## 5. Activating or deactivating a product on an existing licence

To deactivate or reactivate a product licence:

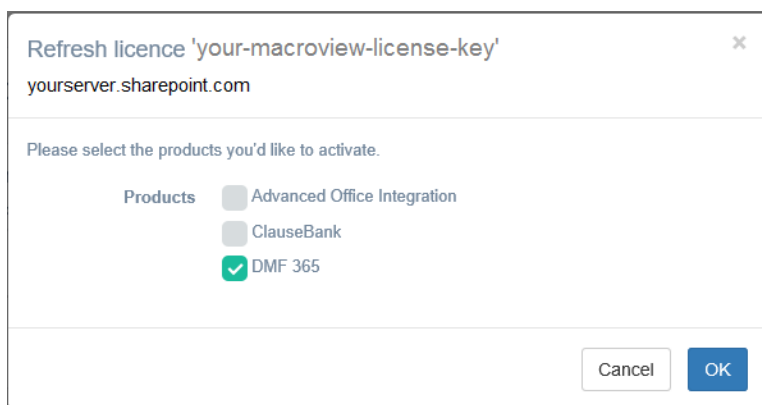
- Log into the MacroView Licensing website.
- Select *Licences, Summary*.



- Locate the licence key that covers the licence being activated or deactivated.
- Click the refresh button.



- Select which products to activate or deactivate (at least one product licence must be selected).

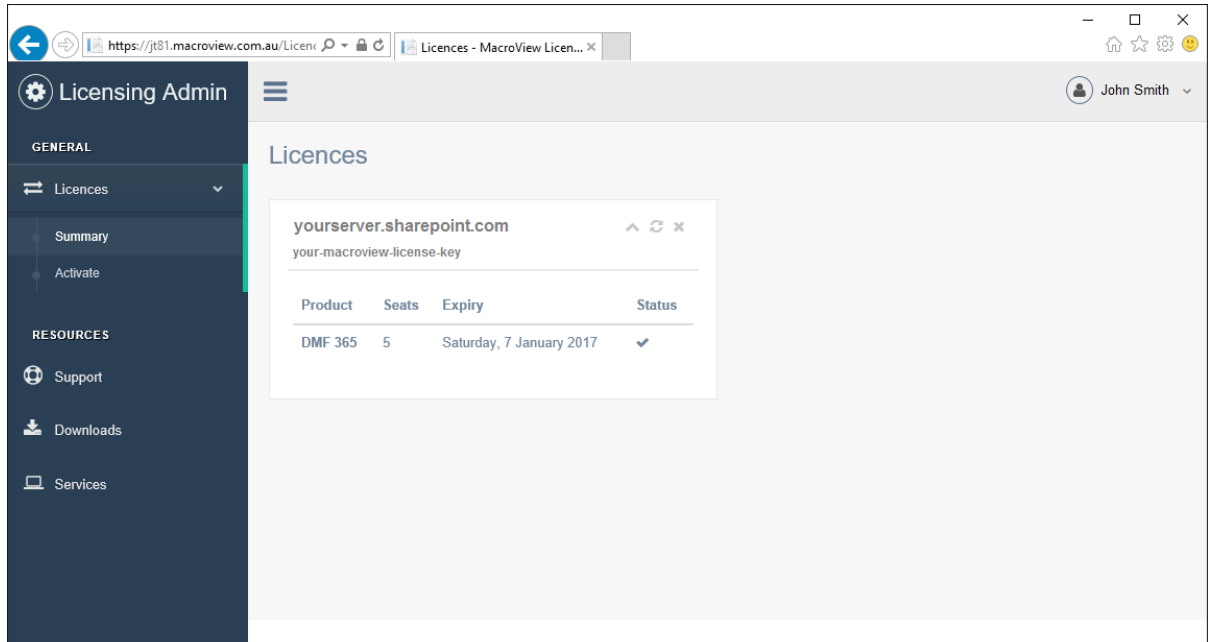


- Click OK.

## 6. Renewing a product licence or adding additional licences

To update a product licence following a licence renewal or a purchase of additional licences:

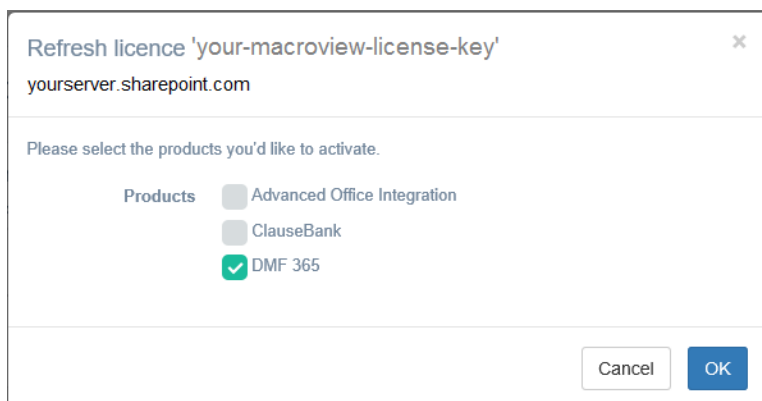
- Log into the MacroView Licensing website.
- Select *Licences, Summary*.



- Locate the licence key that covers the licence being renewed or added.
- Click the refresh button.



- Select which products to activate or deactivate (at least one product licence must be selected).

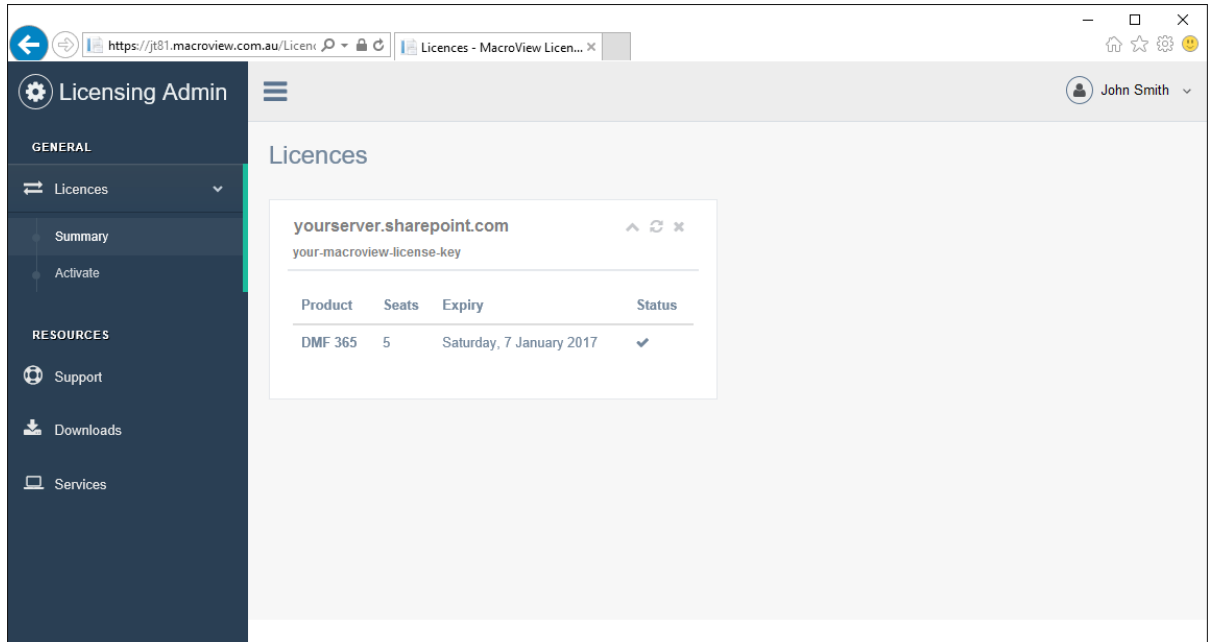


- Click *OK*.

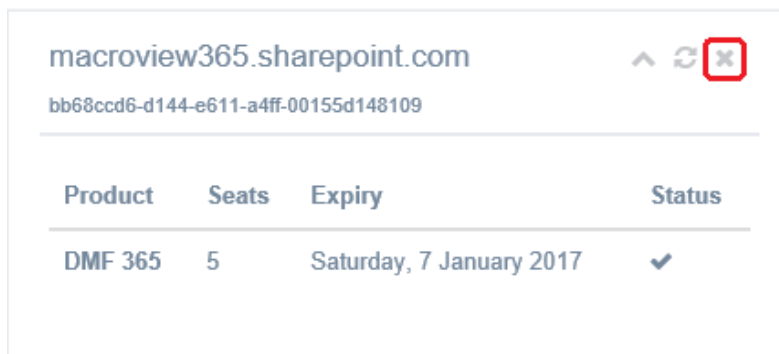
## 7. Removing a licence key

To remove a licence key from your account:

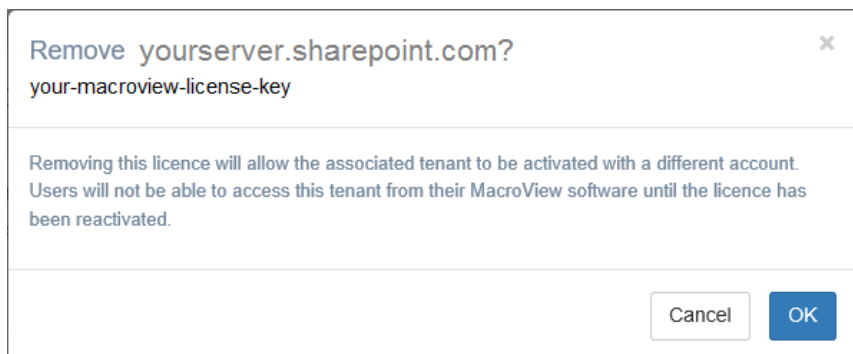
- Log into the MacroView Licensing website.
- Select *Licences Summary*.



- Locate the licence key that covers the licences you wish to remove.
- Click the *remove* button.



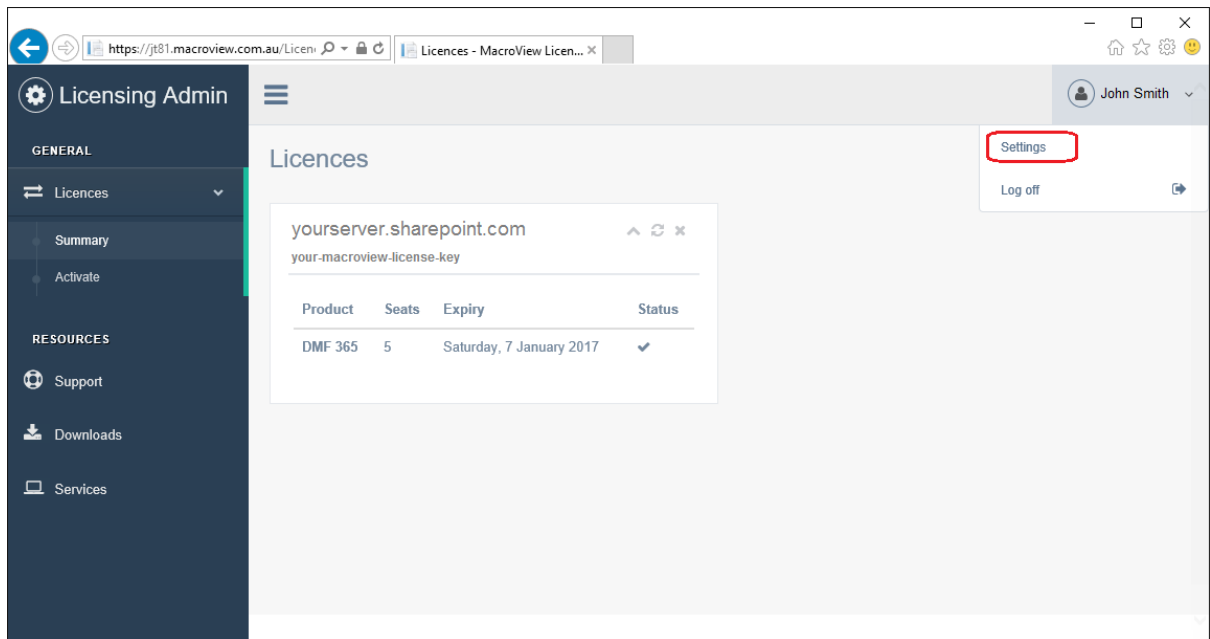
- Confirm that you wish to remove the licence key.



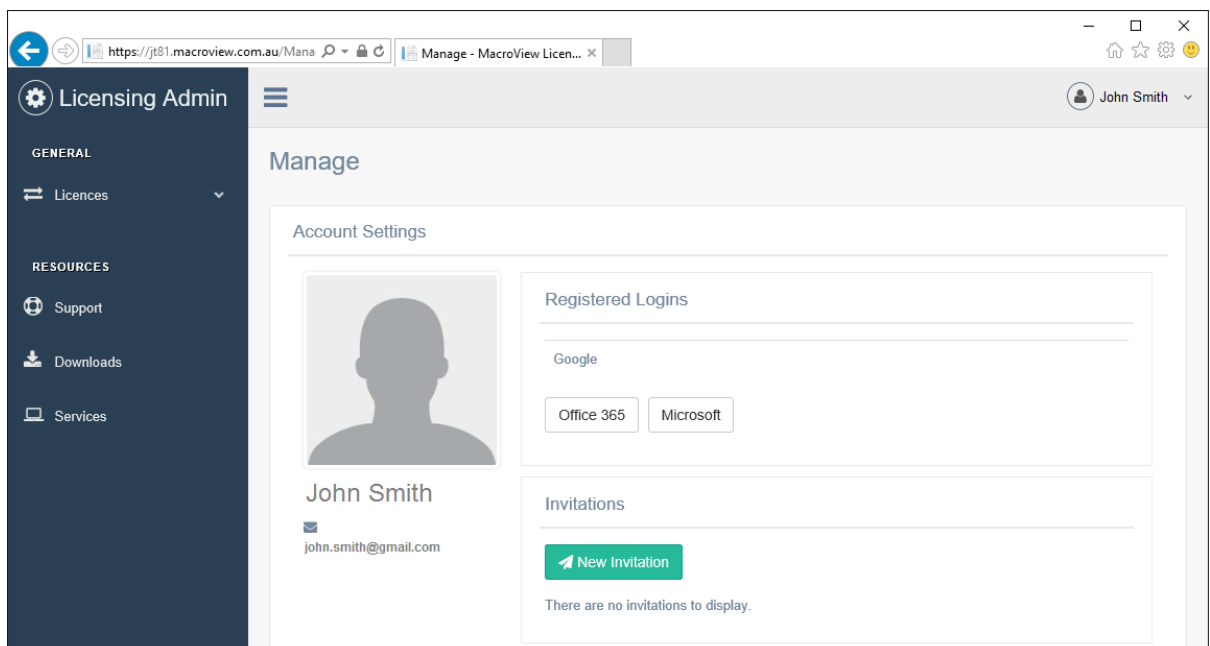
- Click *OK*.

## 8. Managing your MacroView Licensing account

You can manage your MacroView Licensing account by selecting *Settings* for the user account menu.

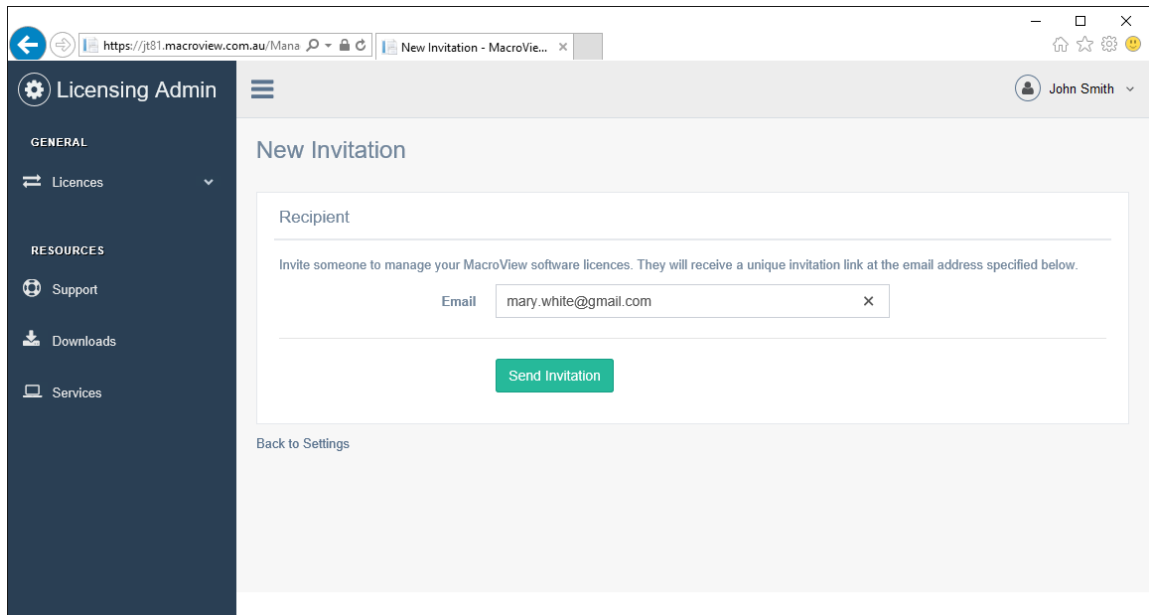


From the user account page, you can register additional *Office 365*, *Microsoft* or *Google* accounts with you MacroView Licensing account and you can invite other users to manage you MacroView product licences.

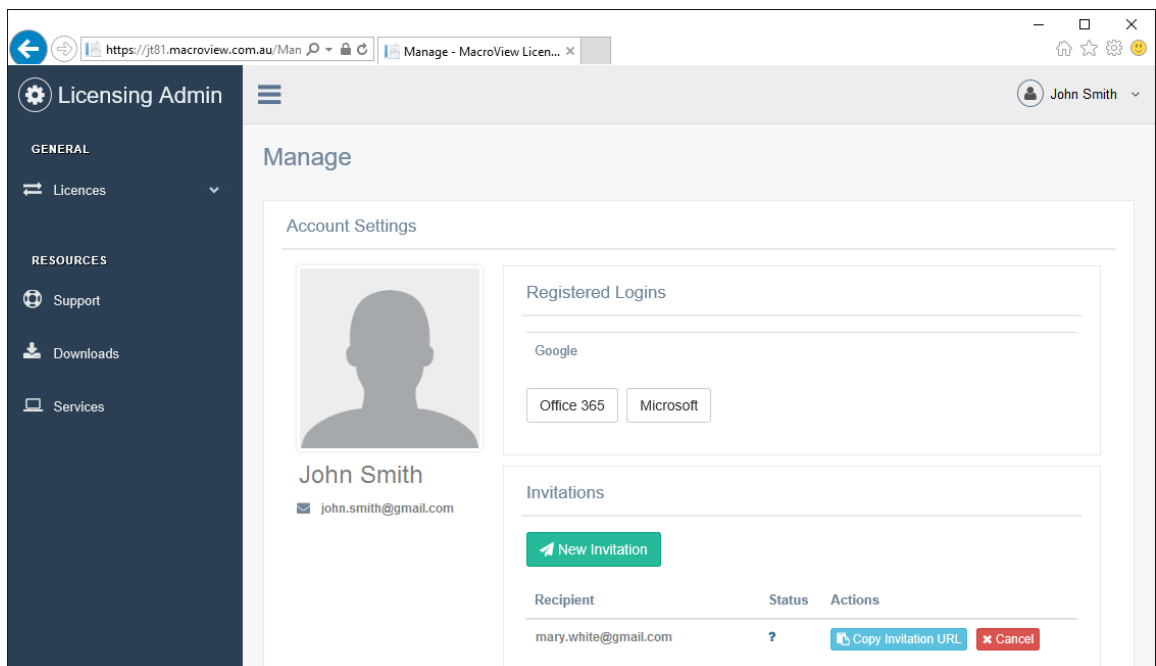


To invite another user to manage your licences:

- Click *New Invitation*.



- Enter the users email address.
- Click *Send Invitation*
- An email with a unique invitation URL will be sent to the invitee's email address.
- The user account page will be reloaded showing the status of any invitations you have sent



- You can then cancel an invitation or copy an invitation's URL to the clipboard.

# MacroView

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## About MacroView

Create | Collaborate | Manage

MacroView is a leader in document automation, email and document management solutions for Microsoft SharePoint® and Microsoft Office®.

Our solutions use the latest technologies across desktop, mobile and the cloud. MacroView software is licenced and used by hundreds of organisations globally across a diverse range of industries. Key features of the software include deep integration with Microsoft Office®, comprehensive document management functionality and efficient support for large volume SharePoint document stores.