

# Merge eDOCS data into MS Office files

Meta Data Manager for eDOCS provides dynamic links that merges meta data into MS Word, Excel and PowerPoint applications.

## Predefine merge fields

Meta Data Manager (MDM) is a plug-in that pulls meta data from the eDOCS DM profile or DM database and subsequently merges fields into Microsoft Word, Excel and PowerPoint documents.

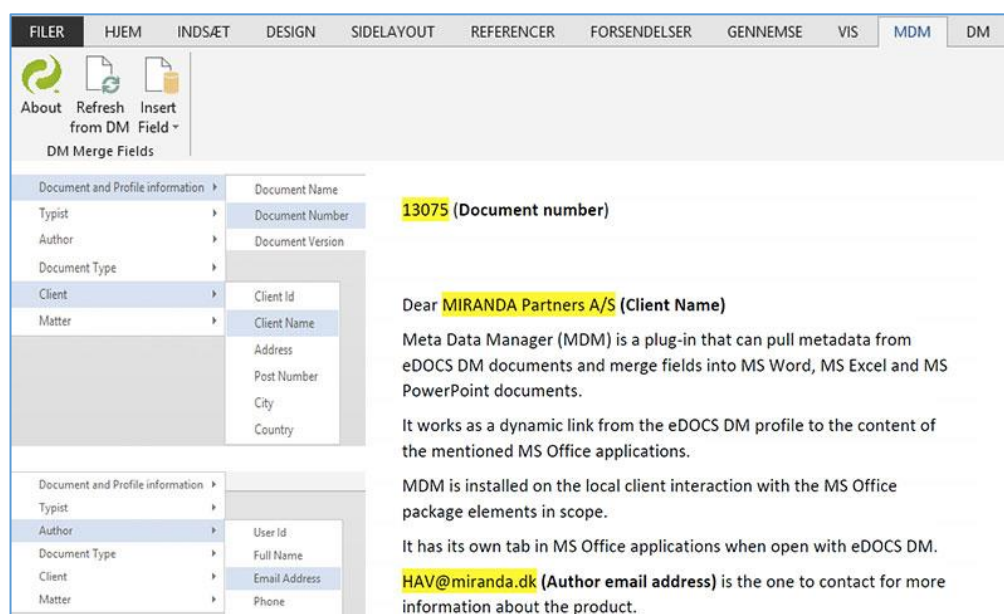
Merge fields with file info and type ID from the eDOCS profile can be predefined in the documents and saved as templates. Great advantage in complying with GDPR!

## MS Office interaction

MDM is installed on the local client interaction with the MS Office package elements in scope. It has its own tab in MS Office applications when open with eDOCS DM.

Data updated in eDOCS also passes through MS Word, Excel and PowerPoint.

The image exemplifies 3 fields merged into a MS Word document.



The screenshot shows the MDM interface within a Microsoft Word application. The interface includes a menu bar with options like 'FILER', 'HJEM', 'INDSÆT', 'DESIGN', 'SIDELAYOUT', 'REFERENCER', 'FORSENDELSER', 'GENNEMSE', 'VIS', 'MDM', and 'DM'. Below the menu bar is a toolbar with 'About', 'Refresh', and 'Insert from DM Field' buttons. The main area is divided into two panes. The left pane, titled 'DM Merge Fields', lists various metadata fields grouped under categories like 'Document and Profile information', 'Typist', 'Author', 'Document Type', 'Client', and 'Matter'. The right pane shows a document preview with several fields merged into the text. The merged fields are highlighted in yellow and include: '13075 (Document number)', 'Dear MIRANDA Partners A/S (Client Name)', and 'HAV@miranda.dk (Author email address)'. The document text also includes a paragraph about MDM's functionality and contact information.



Use Meta Data Manager for eDOCS to ensure that all person-related information in MS Office files are up to date. An advantage in complying with GDPR!

### **Ensure unambiguous reference with Meta Data Manager**

MDM can be used to ensure that all person-related user information in MS Office files are up-to-date.

This ensures unambiguous reference when meta data are extracted from the case complex.

### **System requirements**

- eDOCS DM version 10
- eDOCS DM version 16
- MS SQL server
- MS .NET framework
- MS Office 2013
- MS Office 2016

For Windows only.

### **Tools to improve and expand eDOCS DM functions**

Meta Data Manager is a part of the product line The Managers from MIRANDA Partners.

The Managers contain a number of utilities developed for eDOCS DM administrators and users.

Each Manager has its own role in supporting, improving and expanding eDOCS DM functions.

Find much more information online about each Manager:

[mirandapartners.com/themanagers](http://mirandapartners.com/themanagers)

### **Book a demo today!**

To give you the full idea of the user-friendly features of The Managers, we recommend a demonstration. We'll prepare a specific targeted presentation for you - and schedule it for your time zone of course.

Please contact sales director Jesper Friis directly at +45 2265 0502 or send an email to [info@miranda.dk](mailto:info@miranda.dk) with description of your business interest.

We will quickly get in touch!

We're looking forward to be sharing the great benefits of eDOCS DM and The Managers with you!

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