

ILTA Webinar – 15 April 2026

Synchronize NetDocuments content with SharePoint, Teams & OneDrive for Microsoft Copilot Insights!



ABOUT RAGAV

- My name is **Ragav Jagannathan** (*Phonetic spelling: r-ah-g-uh-v*)
- Working with **Microsoft Technologies** since **1995**
- Spoken at **over 57+ conferences worldwide** - Microsoft TechEd, User Groups, Roadshows, Partner Network, Ark-Legal, ILTACON, SharePoint Symposium, etc.
- Written several **thought leadership blogs** on **iltanet.org** - bit.ly/ragav_ilta
- **ILTA Contributions** (incl. ILTA Peer-Peer Magazine):



ILTA Contributions



ILTA 2021 P2P

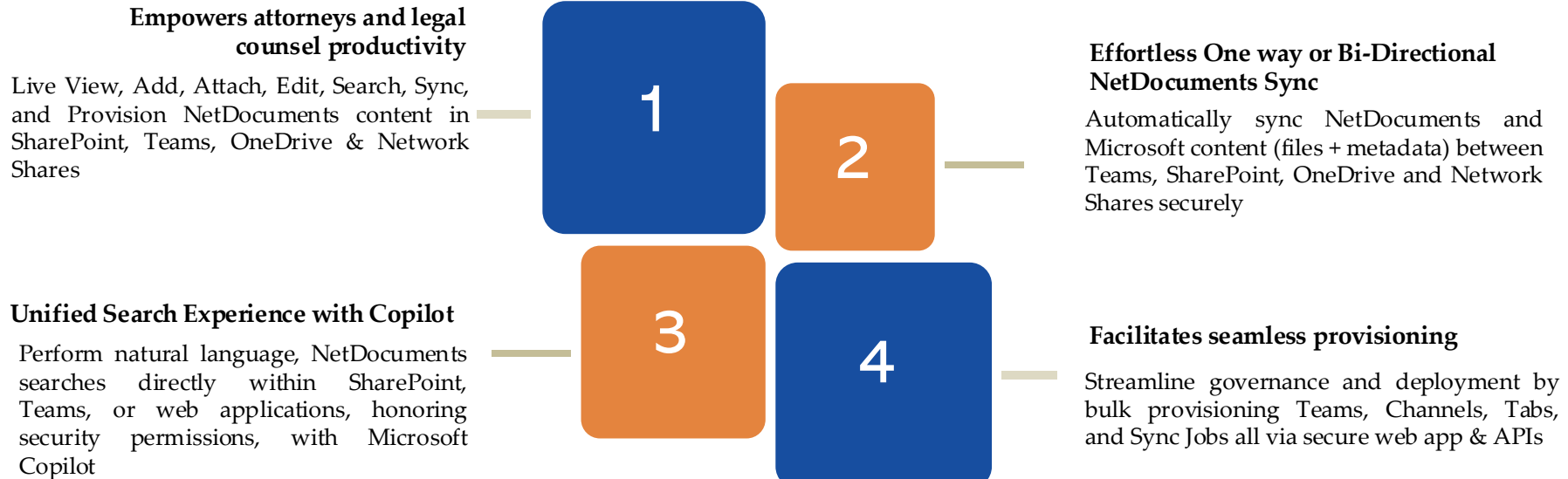


ILTA 2024 P2P

- **Founder & CEO of -**
 - **KLST** – SharePoint & CoPilot Specialists - www.klstinc.com/whyklstforlegal
 - **KLoBot Inc** – M365 & NetDocuments / NetDocs integration Specialists - www.klobot.ai
 - ragav@klstinc.com OR www.linkedin.com/in/ragav

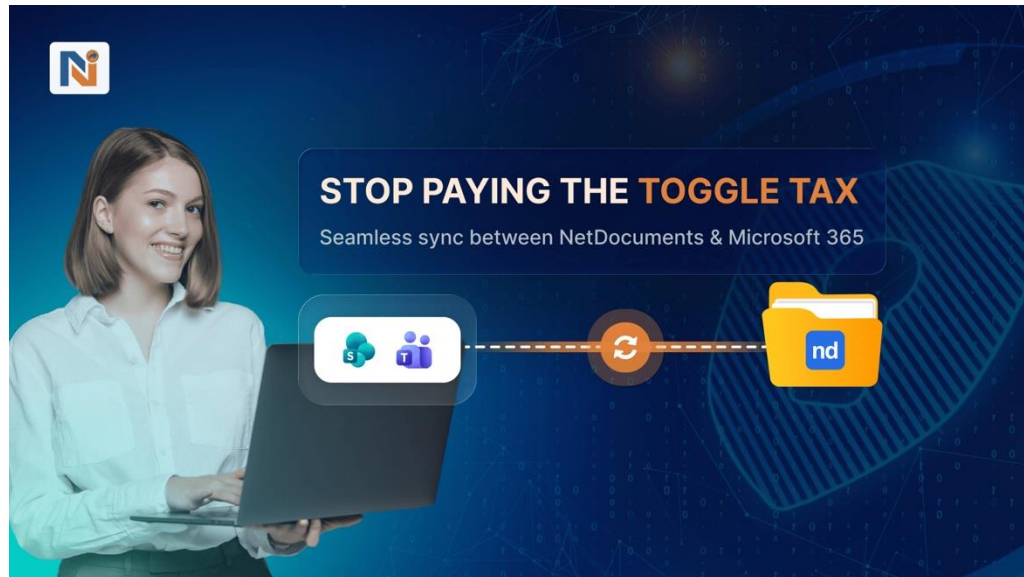
Enhancing Workflow with netDocShare: Bridging NetDocuments and Microsoft 365

Extend NetDocuments capabilities seamlessly into Microsoft 365 for enhanced productivity.



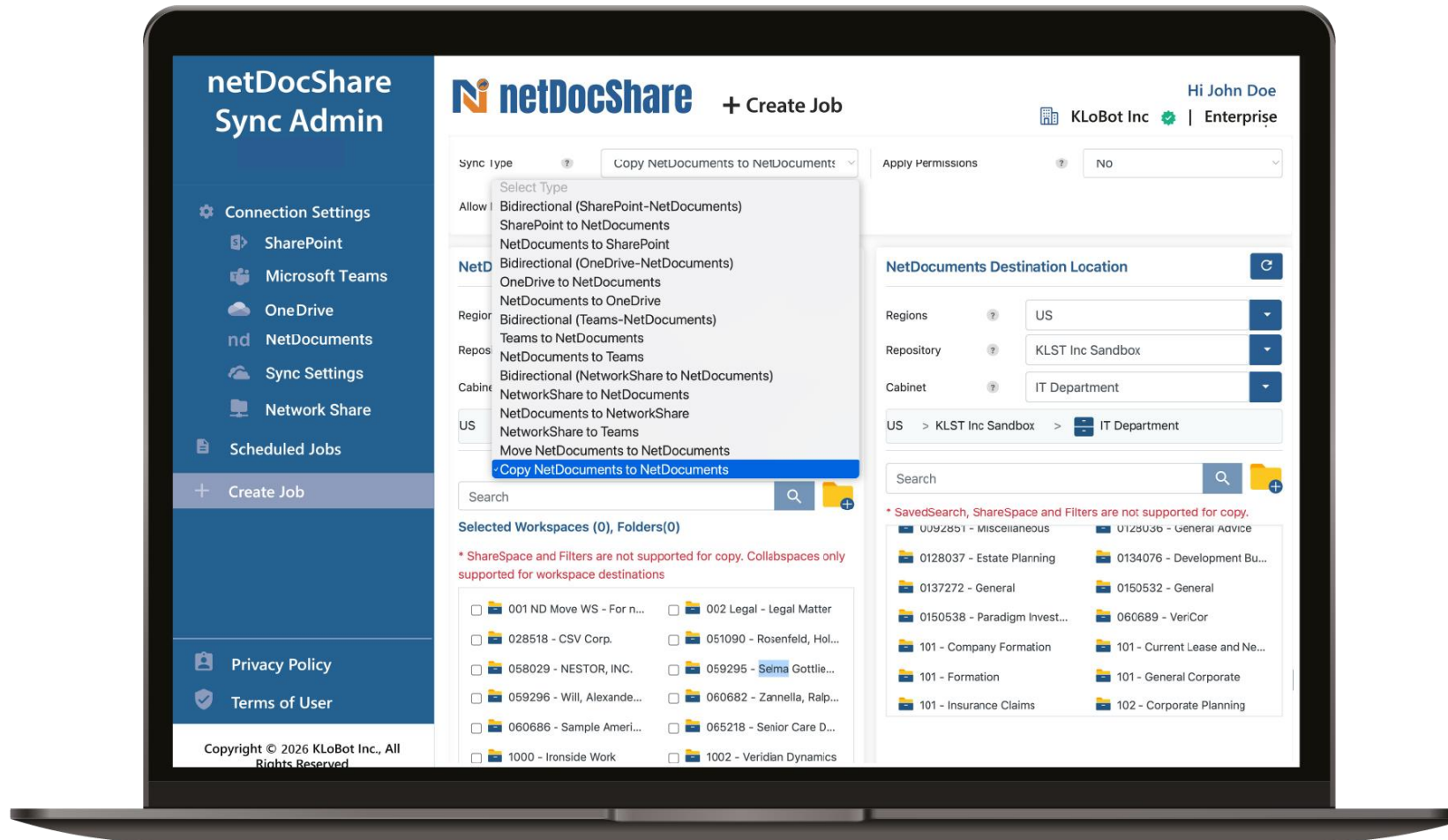
netDocShare Sync – Key Usage Scenarios

1. **Seamless Collaboration** - Bi-Directional Sync NetDocuments content with Microsoft SharePoint, Teams, and OneDrive for seamless collaboration between M365 users and NetDocuments.
2. **Business Continuity** - Backup active workspace content with Microsoft SharePoint and ensure “always-on” & “self-service” access to NetDocuments content within SharePoint in case of service outages.
3. **Inactive Matter Workspace Off-boarding** – Move inactive matter workspaces from NetDocuments to SharePoint Online to free up premium storage in NetDocuments for new matter onboarding.
4. **Surface NetDocuments Intelligence with Copilot** – Sync NetDocuments content with Microsoft SharePoint, Teams, and OneDrive for surfacing intelligence with Microsoft Copilot.
5. **Migrate from Network Share to NetDocuments** – Use netDocShare Sync to migrate “very large” volumes of content from Network Shares to NetDocuments (as well as Microsoft Teams and SharePoint)



netDocShare Sync – NetDocuments & SharePoint Sync

Automatically perform bi-directional / one-way sync of everything or selected folders/files, including metadata fields, between Microsoft SharePoint Document Library/Folder and NetDocuments Workspaces/folder.



netDocShare Sync – NetDocuments & Microsoft Teams

Automatically perform bi-directional / one-way sync of everything or selected folders/files, including metadata fields, between Microsoft Teams and NetDocuments Workspaces/folder.

The screenshot displays the netDocShare Sync Jobs Administration interface. The left sidebar contains navigation options: Connection Settings (SharePoint, One Drive, NetDocuments, Sync Settings, Network Share), Scheduled Jobs, Create Job, Privacy Policy, and Terms of User. The main content area shows a table of scheduled jobs under the heading "netDocShare Sync Jobs Administration (12 out of 40)". The table has columns for Sync Info, SharePoint, and NetDocuments. Two jobs are visible, both with a Source Status of "Available".

| Sync Info | SharePoint | NetDocuments |
|--|--|---|
| <input type="checkbox"/> Job Id: 62189bc3354e6b0f98a4f859 Sync type: SharePoint to NetDocuments Time Interval: 00:00:30 Created By: Danielle Aguilar | Site URL: https://m365x634... Library: Muellerter GRP Path: /MT Folder/Network Source Status: Available | Cabinet: Clients Library: 1112-NBHC Path: MD333/Net Source Status: Available |
| <input type="checkbox"/> Job Id: 62189bc3354e6b0f98a4f859 Sync type: SharePoint to NetDocuments Time Interval: 00:00:30 Created By: Lewis Carol | Site URL: https://m365x634... Library: Oscorp nc Path: /Oscorp Folder/Network Source Status: Available | Cabinet: Clients Library: 1112-NBHC Path: OS003/Net Source Status: Available |

netDocShare Copilot Agent

netDocShare Teams app integrates with Microsoft Copilot to allow users to perform semantic search within NetDocuments right from within the Copilot agent within Teams.

The screenshot shows a Microsoft Teams chat window with the following content:

- Search bar:** Search (Ctrl+E)
- Status:** Your status is set to do not disturb. You'll only get notifications for urgent messages and from your priority contacts.
- Left sidebar (Agents):**
 - M365 Copilot
 - New chat
 - Agents
 - Researcher
 - Analyst
 - netDocShare Beta 4.2.2
 - Legal Ops Insight Copilot
 - KM Precedent Copilot
 - All agents
 - Create agent
- Left sidebar (Chats):**
 - find gdp related documents
 - Prompts to Extract Key ESPP ...
 - Prompts to Extract Key Intelli...
 - Weekly Email Highlights: Fina...
 - Gasoline Prices vs Quantity G...
 - what are the top 5 things for ...
 - Vacation Policy Access Requir...
 - End User Prompts for Docum...
 - Summary of Confidential Cla...
 - how many vacation days do i...
 - Microsoft Power Apps for La...
 - Power Automate Workflow Id...
 - Direct Reports of Haribabu P...
 - Marketing Contacts in New Y...
 - Firm's Work from Home Polic...
 - Indemnity Clauses in NDA Co...
- Chat Content:**
 - netDocShare Beta 4.2.2:** Yes — CONTOSO LLP does have a lease agreement, and I also found documents related to CONTOSO LLP.
 - Lease Agreement for CONTOSO LLP:** A client-specific, executed lease document exists in netDocShare:
 - CONTOSO LLP COMMERCIAL LEASE AGREEMENT
 - Date: 04/25/2025
 - Author: Ragav Jagannathan
 - Status: Available to open/view This confirms that CONTOSO LLP does have a commercial lease agreement on file.
 - All Documents Related to CONTOSO LLP (Current Search Results):** Based on the repository search using "CONTOSO":
 - CONTOSO LLP COMMERCIAL LEASE AGREEMENT — 04/25/2025 — Ragav JagannathanAt this time, this is the only document explicitly tagged or titled with CONTOSO LLP that is discoverable in netDocShare.
 - If you expect more CONTOSO LLP documents:** Additional files may exist if they are:
 - [Search input field]
 - Message Copilot:** [Input field with a plus sign and a microphone icon]

Thank You

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www.netDocShare.com

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