LIVE WEBINAR | WEDNESDAY, OCTOBER 28, 2026 | 11:00 AM EDT

netDocShare
Your NetDocs content in SharePoint, Teams & OneDrive

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Frontline Managed Services

From NetDocuments to Microsoft Teams, Extranets & Beyond with netDocShare

NetDocuments Everywhere: One Matter, Every Microsoft 365 Workspace

A demo-led session on netDocShare Provisioning and Sync, following one matter across Teams, SharePoint, OneDrive, Extranets and Shared Channels, from opening to archive.

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Meet Your Speaker



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What We'll Cover Today

1

Why NetDocuments Everywhere

One matter across NetDocuments, Teams and client sharing

2

Provisioning

Team, channels, tabs, sync and Extranet from one request

3

Sync

Work in Microsoft 365, govern in NetDocuments

4

Client Collaboration

Extranets and Shared Channels, with access periods and audit

5

Migrate, Archive and Continuity

File shares in, closed matters out, a copy for outages

6

Lifecycle and Takeaways

One matter from opening to archive, and next steps

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From Separate Tools to One Connected Matter

Typical matter setup today

- NetDocuments, Teams, SharePoint and client portals set up as separate jobs
- Files copied out of NetDocuments into Teams and email, then lost track of
- Clients sent documents by email, with no record and no recall
- Little visibility into what clients accessed, or when

What a connected matter delivers

- One request sets up the Team, channels, sync and Extranet
- Attorneys work in Teams on content kept in sync with NetDocuments
- Clients see only what is shared, for as long as agreed
- Ethical walls and a full audit trail, with NetDocuments as the system of record

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Provisioning: Matter Opens, Team Appears

Let's see a live demo now

Demo: request a matter Team, apply a firm-approved template and watch every component appear in one run.

1 Request submitted

Pick the NetDocuments cabinet, client and matter, a template and the people, in one form or via Power Automate.

2 Firm template applied

Approved channels, tabs, naming rules and sharing limits applied to every site.

3 Team and channels built

Standard, private and shared channels, plus Planner tabs added from the template.

4 NetDocuments sync activated

The workspace is linked and its sync job created automatically in the same run.

5 Security inherited

NetDocuments and third-party walls applied across Teams and SharePoint.

6 Client Extranet ready

A secure, pre-configured SharePoint site for external users, linked to the matter.

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Sync: Work in Microsoft 365, Govern in NetDocuments

Let's see a live demo now

1

One-way or bi-directional

Sync between NetDocuments and SharePoint, Teams, OneDrive and network shares.

2

Granular control

Sync a cabinet, workspace, folder, subfolder or a single file.

3

Metadata preserved

Profile fields mapped to SharePoint columns, including client and matter; DocIDs preserved.

4

Ethical wall alignment

Full support for NetDocuments ethical walls, enforced in SharePoint.

5

Native Teams channels

Standard, private and shared channel support.

6

Auto-move to NetDocuments

Files from Teams or OneDrive moved into NetDocuments with links intact.

7

Retry and recovery

Interruptions and throttling retried; jobs resume from the point of failure.

8

Scope that stays current

New workspaces detected and sync jobs created via Power Automate.

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Client Collaboration: Share, Expire, Audit

How it works

1. Secure, pre-configured SharePoint site created from the matter request
2. Sync only the selected NetDocuments content the client should see
3. Admins set who a site can be shared with: internal only, or existing or new guests
4. Access granted for a fixed period, with the end date shown before approval
5. See and change who can reach the site, and each folder and file in it
6. Review site activity by person, date and activity type, and export it

Key benefits

✓ **Access ends on its own**

Ends automatically when the access period is over

✓ **Content stays in sync with the matter**

Selected documents sync back to NetDocuments

✓ **Shared Channels for co-counsel**

Teams Shared Channels via Entra B2B direct connect

✓ **Firm rules on every request**

Naming conventions and sharing limits set once by admins

✓ **Cleanup built in**

Provisioned sites and Teams deleted from within the tool

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Migrate, Archive and Stay Resilient

Let's see a live demo now

Demo: bring file share content in, move a closed matter out and keep a synchronized copy ready for an outage.

1 File share migration

Large volumes of network share content migrated into NetDocuments.

2 Teams archival

Archive Teams and channels, with conversations and attachments saved to NetDocuments.

3 Smart archiving

Inactive matter documents moved from NetDocuments to SharePoint to manage storage cost.

4 Business continuity

A synchronized SharePoint copy of selected NetDocuments content, ready for outages.

5 Sync activity reports

Real-time sync updates, plus an Excel report after every sync job.

6 Bulk, at scale

Create, update or delete many Teams and channels at once, via REST API or Power Automate.

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Case Scenario: One Matter, From Opening to Archive

THE SCENARIO

"A new litigation matter opens on Monday morning. Co-counsel and the client need access by noon, and the first draft is due by end of day."

1	**Open**	Team, channels, sync job and Extranet provisioned in one process
2	**Draft**	Attorneys co-author in Teams; edits sync back to NetDocuments
3	**Share**	Selected content reaches the client and co-counsel, for a set period
4	**Report**	Site activity reviewed by person and date, and exported
5	**Archive**	Team and its conversations archived to NetDocuments

How netDocShare handles it

Provisioned in one process

Matter opening provisions the Team, channels, sync job and Extranet from a template, or via Power Automate.

Work in Teams, govern in NetDocuments

Teams and Extranet edits sync back, keeping NetDocuments the system of record.

Client access, controlled

Clients see only the content selected, with access that ends automatically.

Closed cleanly

Audit reports support compliance; the Team and its conversations are archived to NetDocuments.

Illustrative scenario based on netDocShare Provisioning, Sync and the netDocShare Teams App

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Key Takeaways

1. **One matter, everywhere:** NetDocuments extended into Teams, SharePoint and OneDrive, provisioned from one request.
2. **Share securely, stay governed:** Extranets and Shared Channels share only selected content, for a set period.
3. **Sync without silos:** NetDocuments and Microsoft 365 stay aligned, with NetDocuments the system of record.
4. **Migrate at scale:** Large volumes of network share content moved into NetDocuments.
5. **Archive smarter:** Inactive matter content moved out to free up NetDocuments storage.
6. **Build for continuity:** Selected content kept available in SharePoint if NetDocuments is unreachable.

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Thank You

Schedule your netDocShare demo

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Registered attendees will receive the recording after the session

netDocShare by KLoBot Inc., now part of Frontline Managed Services

netDocShare
Your NetDocs content in SharePoint, Teams & OneDrive

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