

# netDocShare - Seamless Integration of NetDocuments with SharePoint



## NetDocuments Integrated with SharePoint - How to Gain the Best of Both Worlds?

The sharing of files or email documents, whether internally or externally, requires adherence to compliance and data protection laws. NetDocuments is largely used by legal practitioners and offers a single and integrated solution for files with inherent security, governance, and collaboration features.

While NetDocuments is widely accepted among law practitioners for secure storage of legal documents, SharePoint enables easy file sharing and collaboration internally within the team and also provides remote access. SharePoint also provides faster access to users once the NetDocuments files are copied in SharePoint. SharePoint allows attorneys to streamline the files in specific folders with provision to create several sub-folders to maintain all the documents related to individual cases. It also helps in creating SharePoint sites making each case a unique website for lawyers to manage different cases. It can also contain web parts such as calendars, and task lists among others.

Several legal firms have invested in both these solutions to gain the best of both worlds. However, the challenge remains in the seamless integration of these two solutions, as manually moving files, folders, and documents could be a tedious task requiring the allocation of valuable resources for unproductive man-hours.

Typically, law firms or attorneys spend a considerable amount of time managing and updating case files. According to AIIM (Association for Intelligent Information Management), nearly 81% of organizations report difficulty in accessing information across multiple platforms, including mobile devices. Lawyers face overwhelming challenges, especially when documents are placed in multiple locations, and are required to manually transfer files using insecure platforms. According to industry estimates, law firms lose about 10% of productive hours in managing document challenges such as searching for documents and retrieving/recreating untraceable documents.

Among other complexities faced with storing documents across multiple locations, accessing data from a “single source of truth” has become a top priority for knowledge management teams. Quite often, these teams are grappling with multiple sources of the same data, spending significant time as well as effort to identify the appropriate content relevant for lawyers and attorneys.

A 2015 study from AIIM also indicates that one in four workers fail to conform with document management and retention rules. The legal industry requires an industry-specific Enterprise Content Management (ECM)/Business Process



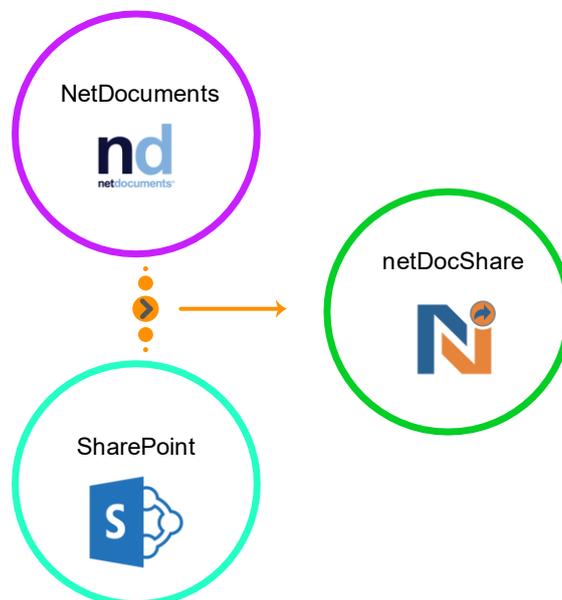
Management (BPM) software that meets the twin criteria of optimal man-hours that are profitable for lawyers and cost-efficient for clients. Law firms are looking to strengthen their intranet systems with an intuitive interface that allows easy access to an internal team with security features. Without a proper solution in place, it becomes difficult to manage each case for search, sort, and web portal interface.

The industry requires a strong value proposition that would allow the seamless experience of working across both these solutions without having to move the files from their primary location.

## netDocShare Integrates the best of NetDocuments and SharePoint

netDocShare fills this void for a viable solution by enabling the integration of file security features of NetDocuments with the flexibility of SharePoint. The solution creates an enabling environment for lawyers to access NetDocuments files accessible in SharePoint portals and searches. Conversely, netDocShare also allows SharePoint users to navigate and access NetDocuments files with a user-friendly interface. By bridging and building interoperability between NetDocuments and SharePoint, netDocShare provides the necessary flexibility and ease of access while addressing the requirements of confidentiality and privacy.

**Fig 1: Integration of NetDocuments and SharePoint**



*Source: KLoBot*

When a legal firm uses NetDocuments for storing and SharePoint as a collaboration tool, netDocShare eases the automation of transferring NetDocuments files to the SharePoint location and offers features including search modules in an integrated web

parts interface. For clients, this results in gaining value-added features of SharePoint that vastly boosts productivity.

## Fig 2: Features List



*Source: KLoBot*



Additionally, when using SharePoint on-premise intranet pages, netDocShare provides an edge by readily transferring files from NetDocuments location to SharePoint pages. netDocShare significantly enhances the user experience of using SharePoint without focusing on transferring NetDocuments files.

## netDocShare Approach

netDocShare allows SharePoint users to use NetDocuments with filters, searches, and saved searches in the intranet pages of the firm. The solution provides web parts to search and view documents with distinct features with Recent Docs WebPart, Normal View WebPart, and Treeview WebPart. This allows users to easily navigate SharePoint for content stored on NetDocuments and extract relevant information and documents from cases. While every WebPart provides the ability to view and access documents, their functionality extends to include viewing Saved Searches, Filters, SharedSpace, Folders and Sub-Folders as well.

**Fig 3: netDocShare Approach**



*Source: KLoBot*

- **Recent Docs WebPart:** Tracks user activity and shows up to last 40 recent documents with options to search categorically with 'most recently searched', 'most recently opened', and 'most recently edited'.
- **Normal View WebPart:** Provides a standard view of the content with the ability to access documents using point and click. The WebPart also enables the user to view saved search and filters in a folder or sub-folder .
- **Treeview WebPart:** Displays documents from multiple sources of cabinets, folders, and workspaces. It functions as a file manager application and provides an intuitive interface to access folders and sub-folders in a tree structure.

netDocShare leverages the use of SharePoint to navigate NetDocuments with several features to simplify search categorically and use SharePoint to manage secured NetDocuments in customized formats to suit user preferences. The solution also enables users to access SharePoint hosted on-premises and on the cloud with Office 365 with email document management through any device connected to the internet, including mobile devices.

The feature-rich netDocShare empowers legal teams to use SharePoint to automatically transfer NetDocuments content to SharePoint pages. netDocShare enables even non-technical users to easily configure and install the solution without complexities in software integration through simple and easy configuration features. The solution enables knowledge management teams to provide a single source of truth while accessing content from either of NetDocuments or SharePoint. The simple and intuitive user interface makes the solution suitable for attorneys and law firms. netDocShare is targeted at attorneys and/or law firms to streamline and aggregate large volumes of files from different cases by converging the security of NetDocuments with collaboration features of SharePoint, helping in saving several productive hours and enable attorneys/lawyers to focus on more vital tasks for faster case resolutions.