netdocuments®

ChatLink™

Included with **PLAN**

How NetDocuments Integrates with Microsoft Teams to Accelerate Firm Productivity

Your lawyers don't have time to waste, which is why operating with technology that streamlines their workflows is critical. But legal work is unique in its requirements for additional security and governance measures at every step in the creation process—measures that result in productivity breakdowns.
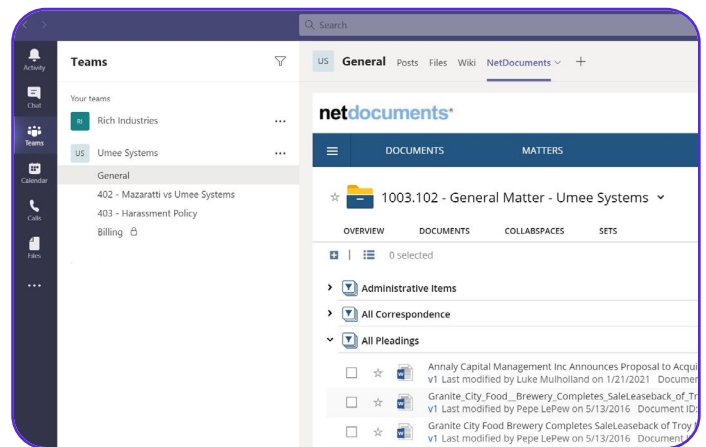
While every CIO is familiar with the adage "security isn't convenient," the NetDocuments and Microsoft partnership has created a new reality where security and governance are not only the right choice, they're the easy choice.

Stop Compromising Your Team's Workflow

Your legal professionals need technology that allows them to stay connected, ask questions, and share knowledge regardless of their location. Your clients need the assurance that their information will never end up in the wrong hands.

Rather than slowing work and collaboration in the name of security and governance, **firms like yours are turning to ChatLink from NetDocuments.** ChatLink connects Microsoft Teams directly to your NetDocuments repository, giving users the power to

To help you maintain security and governance, ChatLink integrates NetDocuments with Microsoft Teams.

have real-time conversations and direct access to matter content without ever leaving Teams—increasing work productivity and communication while maintaining security and governance measures they need to spend less time searching for answers and more time focused on key tasks.

> *"The power and simplicity of NetDocuments...truly elevates the level of services, data protection, and productivity tools we provide to our attorneys and our clients."*
>
> Curt Montague, Director of Technology Services, Sheppard Mullin
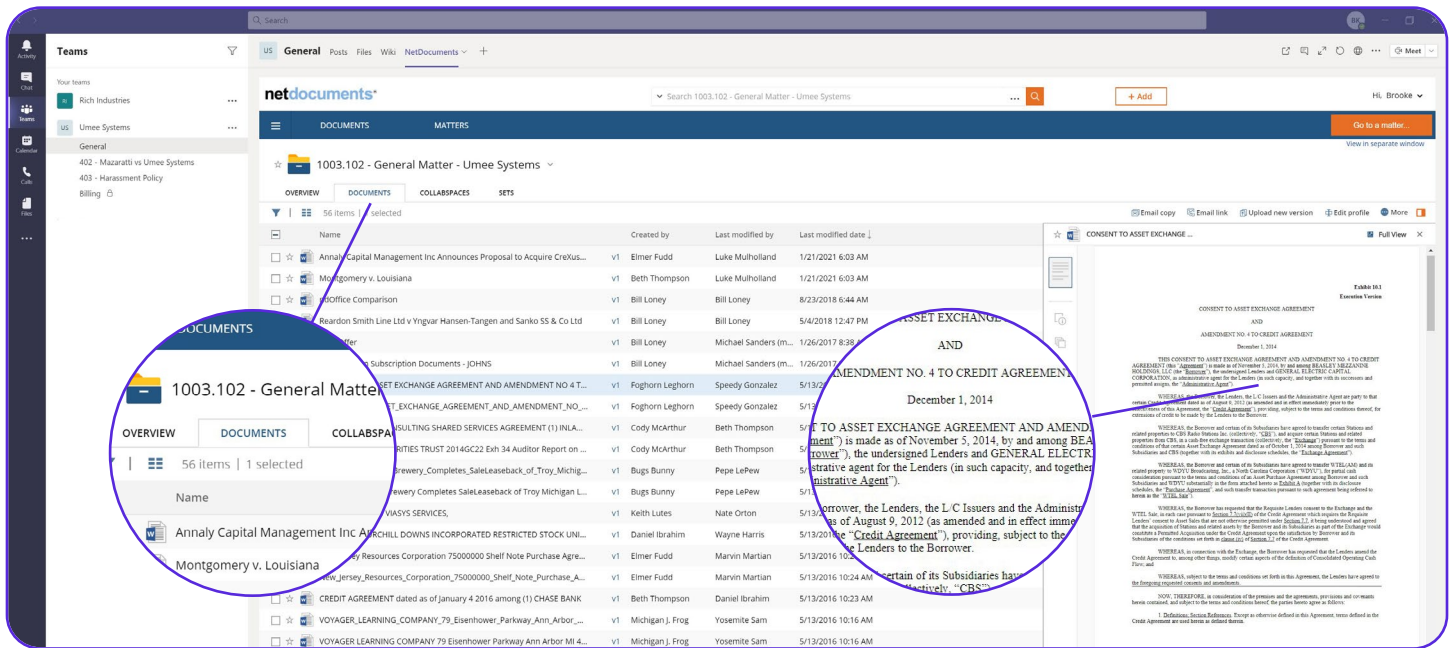
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When Security *IS* Convenient, *That's Work Inspired.*

Technology has finally been recognized as a core differentiator in the legal market, making it more important than ever that your software drive productivity and efficiency *while* fulfilling security and governance requirements.

MAXIMIZE EFFORT, MINIMIZE DISRUPTIONS

Your teams are already moving between matters at lightening speeds, why make them shift between technologies?

ChatLink gives users the ability to work in NetDocuments completely without ever leaving Teams—automatically opening matters based on the connected Teams channel to minimize time spent sifting through folders and workspaces. **From the associated Teams channel, members of the same matter can share links, open, edit, and check documents out or in with a single click.**

With ChatLink, you never have to leave Microsoft Teams while still maintaining the security and efficiency of NetDocuments.

This connection point creates a **seamless collaboration experience** that speeds revisions, increases knowledge sharing on a matter, and keeps conversations organized.

CONFIDENTLY MAINTAIN DOCUMENT SECURITY

You're concerned about document sprawl and must ensure your files stay under lock-and-key in your selected repository. ChatLink ensures your users have the tools required to do just that.

When users access NetDocuments via the Teams interface they are working directly within your repository. This means as document links are shared or files are checked out and worked on, every document is subject to the security provisions you have already configured for your repository, meaning that you just made the right choice the easy choice for your users.

PEEK INTO THE FUTURE

Our ChatLink integration will continue to evolve, and new capabilities are already underway to leverage new functionalities in Microsoft Teams. Below is a look at upcoming features that will protect user's flexible workflows while strengthening document security even further:

- **Mirroring** will enable your teams to select conversations in a Teams channel to be automatically saved and uploaded into a NetDocuments matter file.
- **Documents uploaded in the Posts tab** will make it possible for files uploaded to a Teams channel to be automatically previewed, linked, and accessible to NetDocuments users.
- **In-line document previewing,** or 'unfurling,' will provide a quick preview of a file stored in NetDocuments within the Teams interface.

The ultimate factor for any technology choice is whether it adds or removes stressors. ChatLink removes disruptions your users experience every day, such as switching between interfaces, maintaining access rights, or even filing documents appropriately. With a unified system and innovative approach, it's clear to see why ChatLink will continue to be the tool of choice that supports your users each and every day.

Additional NetDocuments and Microsoft Integrations that Accelerate Team Productivity

NetDocuments works seamlessly with Microsoft products, delivering an intuitive experience while minimizing workflow disruptions. The following page highlights additional NetDocuments and Microsoft integrations that your users, team, and company can enjoy.

> *"If you ask anybody in our firm about going back to our old DMS I don't think there would be any takers."*
> Martin Langan Chairman & Innovation Director, legalmatters

Additional NetDocuments and Microsoft Integrations

ndMail

The ndMail integration provides a suite of email management and productivity tools for legal and corporate professionals who operate within Outlook.

Leveraging predictive filing, machine learning, and artificial intelligence, lawyers and legal professionals can file email into NetDocuments accurately, quickly, and with minimal effort.

Additionally, ndMail provides a window into a user's NetDocuments repository, boosting productivity by searching, managing, and viewing NetDocuments content without ever leaving Outlook.

ndOffice

ndOffice provides deep integration into Microsoft Office applications and Adobe Acrobat. These integrations streamline workflows with documents, versions, and uploading documents directly to court websites or United States Patent and Trademark Office (USPTO) without having to download a local copy of the file.

The robust email attachment functionality inherent in ndOffice allows you to craft your email attachments in just the way you want the recipient to view them. This includes tailoring attachment names, their order, and even converting to PDF or zipping up the attachments on-the-fly.

ndOffice also allows you to quickly access your recent documents and document statuses via the Activity Center, always at your fingertips in your computer's system tray or the taskbar.

FlexStore

FlexStore gives you control over the physical location of your data by facilitating geo-aware content storage through a single, convenient user interface. FlexStore can connect to any Microsoft Azure BLOB (binary large object) storage instance, in any of their highly secure service locations across the world.

Power Automate Connector

The NetDocuments Connector for Microsoft Power Automate enables you to automate time-consuming manual processes by adding cross platform workflows and robotic process automation to your NetDocuments solution.

Providing easy access to over 50 NetDocuments API calls, you will have the power to automate manual processes on documents, workspaces, folders, users, and groups in NetDocuments through Microsoft Power Automate.

With this tool, you can automatically create WorkSpaces and CollabSpaces, add users to a repository, create groups, add users or groups to a cabinet, and more, giving you time to focus on other strategic initiatives.

NetDocuments to Office 365 Data Loss Prevention (DLP) Integration

NetDocuments DLP allows you to create and apply classifications and policies that control the actions authorized users can take, in order to prevent documents from being removed from the NetDocuments repository maliciously or accidentally.

In coordination with Microsoft, NetDocuments is developing a robust integration between the Data Loss Prevention (DLP) capabilities found in NetDocuments and those provided by Office 365 DLP.

DLP policies found in the Office 365 Security & Compliance Center today allow you to identify, monitor, and protect sensitive information.

As the NetDocuments integration is finalized later this year, your Office 365 and NetDocuments DLP policies will be connected and able to operate in sync.

Microsoft Cloud Application Security (MCAS)

Planned for mid-to-late 2021, NetDocuments will provide a connector to Microsoft Cloud Application Security—a multi-mode Cloud Application Security Broker (CASB). This connection will provide visibility into your cloud applications and services, leveraging sophisticated analytics, to help you identify and combat a variety of cyberthreats.

ABOUT NETDOCUMENTS

Storing, managing, and protecting millions of documents that are created and shared by thousands of people is never easy. All too often, they become a chaotic, obtrusive, and risky burden on your organization.

NetDocuments changes the equation, with a content platform that removes the barriers and transforms all your documents into an unstoppable engine for collaboration, productivity, growth, and inspired work—without limitations or restrictions.

With NetDocuments, millions of scattered documents become one source of unified insights. Your content management processes and workflows make the leap from intuitive to invisible. The full power of your collective knowledge and past work becomes available wherever your people need it. And every document gets the industry's best protection against any type of threat—from careless employees to nation state attacks.

So when you imagine a future where your content is always safe, organized, compliant, and available to inspire your best work, NetDocuments is ready to take you there.

NetDocuments is the leading cloud-based document and email management solution that helps law firms and teams securely and easily store, collaborate, and organize documents in one location. Backed by 20 years of experience with over 3,050 customer firms worldwide, there's a reason why NetDocuments is the #1 choice for law firms and legal teams across the globe.

When technology is smart enough to stay out of your way, *That's Work Inspired.*
Learn more at www.NetDocuments.com or call us at **(866) 638-3627.**