

Power Automate Connector

Guide

What is NetDocuments Power Automate Connector?

Microsoft Power Platform is a suite of technologies designed to let customers with or without programming expertise create powerful business solutions. The Power Platform consists of:

- **Power Apps:** A low code application development platform
- **Power BI:** Business intelligence and analytics
- **Power Virtual Agents:** Chatbots for customer service or internal applications
- **Power Automate:** Previously known as Flow, a workflow tool to connect elements of the Power Platform to other platforms to produce flexible business solutions.

Power Automate is a powerful low code/no code solution for automating tasks and building workflows. Microsoft provides templates, and then partners work with Microsoft to build Connectors that allow the workflows to access data in many systems and repositories:

- Power Automate - <https://docs.microsoft.com/en-us/power-automate/getting-started>
- Power Automate Template Library - <https://us.flow.microsoft.com/en-us/templates>
- Power Automate Connectors - <https://us.flow.microsoft.com/en-us/connectors>

NetDocuments provides a Connector that makes it easy to use over 50 NetDocuments API calls with Power Automate flows. The NetDocuments Connector can be [downloaded from this page in the Connectors Library](#). The full list of API calls available via the Connector are provided [in the Appendix](#).

What can the NetDocuments Power Automate Connector do?

Thanks to Microsoft, there are many options for what can be achieved using Power Automate, the Connector, and your NetDocuments. Note that Microsoft limits the number of actions can perform based on your Microsoft License:

- **Connection limits:** 500 requests per minute / per connection
- **API requests made in a 24 hour period:** 2,000 to 20,000, depending on license

Please see the Microsoft Documentation for further information:

1. <https://docs.microsoft.com/en-us/connectors/custom-connectors/faq#limits>
2. <https://docs.microsoft.com/en-us/power-platform/admin/api-request-limits-allocations>

Additionally, Power Automate is typically used in the following ways:

- Within Power Apps, to connect different services and/or trigger alerts and data flows. For example, when a Power App inserts a new record to a SharePoint list, and that action triggers a flow to send an alert email.
- A new record is added to a persistence location, which triggers a flow to duplicate the same record (or a subset or superset of it) to a separate persistence location.
- An administrative flow (a flow run as a Service Account/admin user) that is triggered by an event, such as: inserting a new record, the receipt of an email (often to a shared email box), new tweets matching defined criteria are created, an identified RSS feed is updated, a form on company's web site is submitted, etc.
 - Alternatively, the admin flow could be run on a schedule (for example, once per day) that looks for updates/new records in a specific system and then triggers a responsive action.

Typically, flows require a *data* persistence layer, either as the mechanism for triggering the flow and/or for the flow to insert a new record after it has been triggered. This behavior requires the use of an O365 persistence service (SharePoint, etc.) or a persistence service that has a connector.

NetDocuments can only provide document persistence but not data persistence, which may need to be provided by another system.

The NetDocuments Power Automate Connector can enable Power Automate flows to call:

- Document Actions
- Folder & Container Actions
- Workspace Actions
- Repository Actions
- Cabinet Actions
- Group Actions
- User Actions
- Lookup Table Actions
- Search Actions

Using these building blocks, there are many potential use cases where Power Automate flows can make use of NetDocuments features and functionality to solve business problems. The following are some suggested categories and examples:

Information Governance

- Get Repository, Cabinet, Workspace and Document information
- Search a cabinet and modify access control lists

Matter Management

- Create Workspaces
- Close Workspaces
- Re-opening a workspace / re-activating a matter
- Create Folders and file documents to those folders
- Create CollabSpaces

Document Workflow

- Document review workflow
- Document approval workflow
- Get document content and deliver to a different system for conversion e.g. put text into a web page or deliver to Azure Cognitive Services for analysis

Document Management

- Upload documents from a file share, a OneDrive or a SharePoint as examples
- Create a new document based on a trigger action taken in a different system
- Check in and lock a document, or lock a version
- Follow Documents, Folders, Workspaces
- Create new versions

Administration

- Managing Groups – create or delete groups
- Managing Users – add or remove users from a repository
- Get cabinet settings and custom attributes
- Create, update or delete Lookup Table entries

Suggested Use Cases for NetDocuments Power Automate Connector

The role of the NetDocuments Power Automate Connector is to allow Power Automate flows to make use of the NetDocuments API calls. The following are examples of how the Connector can be used:

- Create a new Matter based on triggers from another system, e.g.:
 - Using an event listener that is linked to the creation of a new matter record in the other system
 - By reading the new matter information from a file or an online location (e.g. Office365)
- By triggering the flow manually, Trigger an approval workflow when certain changes are made in a NetDocuments repository (e.g. a document is added, moved, or updated)
 - Note: because NetDocuments is not event driven, a poll for these changes on a schedule is needed
- Use a flow to save documents to a given NetDocuments location as part of a workflow which will likely be triggered based on event that occurs in another system
- Trigger administrative features, such as updating existing lookup records, by an event in a third-party system or by running a query on a schedule.
- Manage users and groups, for example:
 - Track external users in a repository and changes to membership
 - Obtain group membership for these users
 - Automatically remove external users from the repository if they have not logged in for a certain number of days (and notify an administrator)
- Create 'follows' (RSS feeds) automatically on newly created folders.
- Monitor a source such as Twitter, gather information in a document, and then file it into your repository.
- Using an Excel sheet as a meeting checklist, use Power Automate to pull names from it and create a Teams or GoToMeeting event. Once the meeting is created, create a NetDocuments folder for the meeting agenda and all new documents created or completed during the meeting.

For a more detailed discussion of how the **Power Automate Connector** can benefit your firm or to get started, contact your **NetDocuments** representative by calling **866.638.3627**

APPENDIX

Actions for Enhanced NetDocuments Power Automate Connector

Key: Italics = Based on non-public REST call

Document Actions

- Create Document
- Update Document
- Create New Version of Document
- Get Document Content
- Get Document Profile
- Delete Document
- Check In Document
- Check Out Document
- Create Secured Link
- Get Document History
- Delete Document
- Get Document Versions
- Follow Document
- *Lock Document*
- *Unlock Document*
- Lock Document Version
- Rename Document

Folder & Container Actions

- Create Folder
- File Document to Folder
- Unfile Document from Folder
- Follow Folder
- Get Folder Items
- Delete Folder
- Get Container Contents (v2)
- Rename Folder

Workspace Actions

- Create a Workspace (from a single attribute)
- Get a Workspace (from a single attribute)
- Create a Workspace (from parent-child attributes)
- Get a Workspace (from parent-child attributes)
- Get Workspace Information
- Refresh a Workspace
- Create CollabSpace

Repository Actions

- User Actions
 - Add User to Repository
 - Remove User from Repository
 - Get Repository Users
- Repository Group Actions
 - Create Repository Group
 - Delete Repository Group
 - Get Repository Groups
- Get Repository Information
- Get Repository Log
 - Consolidated Activity Log
 - Administrative Log

Cabinet Actions

- Cabinet Group Actions
 - Add Group to Cabinet
 - Remove Group from Cabinet

- Get Groups in Cabinet
- Get Unhidden Groups in Cabinet (and access rights)
- Create Cabinet External Group
- Get Cabinet Custom Attributes
- Get Cabinet Information
- Get Cabinet Settings

Group Actions

- Group Member Actions
 - Add Member to Group
 - Remove Member from Group
 - Get Group Membership
- Get Group Information

User Actions

- Get Current User Info
- Get Selected User Info
- Create User

Lookup Table Actions

- Lookup Entry Actions (single level)
 - Create Lookup Entry
 - Update Lookup Entry
 - Get Lookup Entry
 - Delete Lookup Entry
 - Search Lookup Entries
- Child Lookup Entry Actions
 - Create Child Lookup Entry
 - Update Child Lookup Entry
 - Get Child Lookup Entry
 - Delete Child Lookup Entry
 - Search for Child Lookup Entries

Search

- Search Cabinets (trigger)
- Search a Cabinet and Modify ACLs

When using NetDocuments in Microsoft Power technologies note:

- The updated NetDocuments connector does not include all public v1 and v2 REST calls
- REST calls for other NetDocuments applications – if they exist – are not part of the Connector
- The main NetDocuments REST calls are NOT event-driven
 - This limits how NetDocuments can be used in flows. For example, there is no way to automatically trigger a flow when a new document is saved to a given location.
- The NetDocuments connector does not include a UI but relies on inputting IDs (DocIDs, FolderID and UserIDs)