



KL Software Technologies Inc.
Leading Digital Transformation

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Secure Matter Collaboration in Microsoft 365 and iManage

From Provisioning to Content Collaboration

Law firms are increasingly using Microsoft SharePoint and Teams to collaborate internally and with clients & advisors -- ensuring secure, structured, and governed access to matter content.



Meet Your Speakers



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What We'll Cover Today

1

The Challenge: Legal Collaboration Today

Why firms struggle with secure, governed matter collaboration

2

Matter-Centric Teams Provisioning

Auto-create structured Teams & SharePoint environments aligned to matters

3

Seamless Content Synchronization

Share DMS, metadata, and permissions between iManage and Microsoft 365 (email, Teams, or OneDrive)

4

Secure External Collaboration

SharePoint extranets & Teams shared channels for client-facing portals

5

Flexible Content Access

Work on iManage documents directly in Teams & SharePoint

6

Governance, Ethics Walls & Takeaways

Maintain compliance, auditability, and ethical walls end-to-end



The Challenge: Legal Collaboration in Today's Firm

Today's Pain Points

- iManage Work is the system of record, but most collaboration tools live outside it
- Attorneys copy documents out of DMS to share via email or Teams -- losing governance and expanding storage use
- External sharing with clients requires manual, error-prone file transfer workflows
- IT teams struggle to provision matter-specific Teams environments consistently
- Ethical walls and permissions are difficult to enforce across multiple platforms

Business Impact

- Version conflicts and lost document history
- Security gaps when content leaves the DMS
- Attorney time wasted switching between platforms
- Compliance and audit trail breaks down
- Client experience suffers with clunky portals

PART 1

Matter-Centric Teams Provisioning

Automatically create structured Microsoft Teams & SharePoint environments aligned to matters - consistently, at scale, with governance built in.



Matter-Centric Teams Provisioning -- How It Works

Let's see a live demo now

1

Matter Created in DMS

New matter opened in iManage or practice system triggers provisioning.

2

Teams Environment Provisioned

imDocShare auto-creates Teams, SharePoint sites & folders for the matter.

3

iManage Workspace Linked

Content, metadata & permissions flow into Teams instantly.

4

Staff Added Automatically

Team members added by iManage role, no IT needed.

5

Ethical Walls Enforced

iManage access controls carry over to Teams & SharePoint.

6

Ready to Collaborate

Attorneys collaborate in Teams; iManage stays system of record.



Provisioning - Key Benefits for Law Firms

100%

Consistent matter
environment setup

0

Manual IT steps
per matter

< 60s

Time to provision
a new Team

Full

iManage permission
inheritance

Structured Environments

- Standardized Teams & SharePoint structure for every matter

Seamless Collaboration

- Attorneys start working immediately, no IT wait

Governance by Default

- Security & ethical walls enforced automatically

iManage Source of Record

- Content flows to Teams, stays governed in iManage

Scalable at Firm Level

- Provision hundreds of matters with consistent governance

Full Audit Trail

- Every action logged for compliance

PART 2

Seamless Content Synchronization

Share documents, metadata, permissions, and versions between iManage and Microsoft 365 - with automated bi-directional sync and governance controls.

imDocShare Sync - Live Sync Architecture

iManage

System of Record

- Governance & compliance
- Document retention
- Ethical walls & ACLs
- Version history
- Full audit trail
- iManage Work Server & Cloud supported

imDocShare Sync Engine

- Bi-directional or one-way
- Metadata & permissions sync
- Scheduled or on-demand
- Full & incremental modes
- Intelligent retry & recovery
- Exception management
- Ethical wall alignment
- Automated, Reliable Synchronization in Sync engine

Microsoft 365

- **Microsoft Teams**
Standard, private & shared channels
- **SharePoint Online**
Intranet, extranet & client portals
- **OneDrive for Business**
Personal workspace & offline access
- **Network File Shares**
Legacy share migration supported
- **Microsoft Copilot**
AI-ready governed content layer



imDocShare Sync - Key Capabilities

Let's see a live demo now

Bi-Directional & One-Way Sync
Flexible sync between iManage and Teams/SharePoint/OneDrive

100% Metadata Preserved
Folders, tags, versions & permissions retained on every sync

Granular Sync Control
Sync at library, workspace, folder, or file level

Ethical Wall Alignment
iManage SPM policies enforced -- no leakage

Auto-Move to iManage
New Teams/OneDrive files move to iManage automatically

Intelligent Retry & Recovery
Transient failures auto-retried, no manual fixes

Enterprise-Scale Logging
Structured logs cut operational noise

Linked Document Mode
Teams users see live links, not copies

PART 3

Secure External Collaboration

Share matter content with clients and external partners securely -
via SharePoint extranets, client portals, and Microsoft Teams shared channels.

Secure External Collaboration - SharePoint Extranets & Client Portals

Let's see a live demo now

How It Works

- 1 Firm provisions a SharePoint extranet or client portal site - personalized to matter
- 2 imDocShare Sync automatically keeps the SharePoint portal in sync with iManage content
- 3 Clients access documents via a secure SharePoint URL - using their own identity
- 4 Clients can view, download, and edit documents directly in SharePoint
- 5 All client edits automatically sync back to iManage - new versions created, audit trail preserved
- 6 iManage ethical walls and access controls apply throughout - clients only see what they're authorized to see

Key Benefits

- **Security Preserved**
Client portal inherits iManage permissions -- no unauthorized access
- **Compliance Maintained**
All sharing actions are audit-logged -- meets regulatory requirements
- **Client Identity Kept**
Clients use their own M365 accounts -- no shared credentials
- **Auto Version Control**
Every client edit creates a new iManage version automatically
- **No VPN Required**
Clients access the portal from any device -- secure browser access



Secure External Collaboration -- Microsoft Teams Shared Channels

Teams Shared Channels Approach

- 1 Create a shared channel in a matter-specific Microsoft Team
- 2 Invite external client or advisor users to the shared channel - using their own Teams identity
- 3 imDocShare Sync keeps the channel's Files tab in sync with the iManage matter workspace
- 4 External users collaborate natively in Teams - chat, meetings, and document co-authoring all available
- 5 Client edits to documents sync back to iManage automatically - full version and audit trail maintained
- 6 Ethical wall policies from iManage are enforced - external users only see authorized content

SharePoint Extranet vs. Teams Shared Channel

Dimension	SharePoint Portal	Teams Channel
User Experience	Browser-based portal	Native Teams experience
Communication	Out-of-band (email, phone)	Built-in chat & meetings
Co-authoring	Via Office Online (browser)	Native Teams co-authoring
Client Requires	Microsoft account or guest	Microsoft Teams license
Best For	Document review & approval	Ongoing matter collaboration

PART 4

Flexible Content Access in Teams & SharePoint

Attorneys access, view, edit, and co-author iManage documents directly inside Microsoft Teams - without switching platforms.



imDocShare One Teams App - Live iManage Access Inside Teams

Let's see a live demo now



My Experience - Personal App

Favorites, Recents, Matters &
Checked-Out docs in Teams nav bar



Channel Tab - Normal View

Live iManage workspace embedded
as a channel tab



Channel Tab - Tree View

Navigate multiple iManage sources
hierarchically



Create & Upload in iManage

Create or upload files into iManage
from Teams



Chat Integration - Share Docs

Share iManage doc cards directly in
Teams chat



Save Conversations to iManage

Save Teams chats as PDFs to iManage



Quick Sync

Users trigger on-demand sync from
Teams Files tab



Zero Data Leakage

Content stays in iManage -- never
moved outside the DMS

Information Governance & Ethical Walls - End-to-End

• Ethical Walls

- iManage SPM (Ethical Wall) policies enforced across Teams & SharePoint
- External users only see content they are explicitly authorized for
- No policy leakage when syncing between systems
- Conflict checks maintained throughout the collaboration lifecycle

• Audit & Compliance

- Every sync action, user access, and file change is audit-logged
- Logs include error category, severity, and timestamp for every event
- Supports legal hold, retention, and e-discovery requirements
- Structured logs reduce operational noise - real issues surface immediately

• Access Control

- iManage permissions inherited by all M365 destinations automatically
- Role-based access consistent between iManage and Teams/SharePoint
- Microsoft Entra ID integration for enterprise identity governance
- iManage remains the authoritative system of record - no shadow IT

iManage remains the single system of governance - every collaboration action flows through iManage controls



Key Benefits - Secure Matter Collaboration with imDocShare

- **Reduce Friction**
No more app-switching; iManage governs automatically
- **Attorney Productivity**
Edit & co-author iManage docs without leaving Teams
- **Consistent Governance**
Uniform permissions & audit trails everywhere
- **Modern Client Service**
Premium client experience via secure portals
- **Scalable at Firm Level**
Auto-provision & sync hundreds of matters
- **No Extra DMS Licenses**
Collaborate in M365 without extra iManage seats
- **Business Continuity**
SharePoint backup keeps content available during downtime
- **Copilot-Ready Content**
Governed content instantly available to Copilot



Takeaways - From Provisioning to Content Collaboration

- 1 A practical framework to connect iManage with Teams & SharePoint - provisioned and governed automatically
- 2 How to provision matter-centric environments at scale, without manual IT effort
- 3 How to securely share content with clients via SharePoint extranets and Teams channels
- 4 How to maintain governance, ethical walls, and audit trails everywhere

Thank You

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