ELM Solutions

Microsoft® SharePoint® Online Connector for Passport®

Wolters Kluwer's ELM Solutions' SharePoint Online Connector empowers Passport clients to leverage Microsoft SharePoint Online to efficiently manage and organize high volumes of matter-related emails and documents such as depositions, briefs, contracts, and affidavits. Staff can quickly locate the documents they need and teams can easily collaborate and share essential information.

The Connector establishes communication between Passport and SharePoint Online, supporting the comprehensive management of emails and documents, and their associated matters directly from the Passport user interface or the Microsoft Office Suite, including Outlook (requires Passport Office Companion).
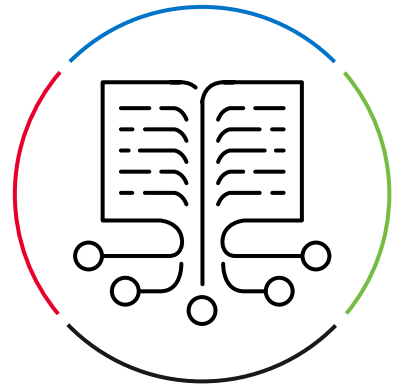
Key benefits:

→ Seamless integration for user-friendly control over matter-related documents and emails.

→ Search, store, and work with documents in SharePoint Online without leaving Passport or Outlook.

→ Scalable to easily manage millions of documents.

Key features provided by the Connector

Direct access from Passport to documents and emails stored in SharePoint Online site

→ Upload/attach documents to be stored in the SharePoint Online DMS, and associate to matter, people, organization, and invoice records.

→ Search for, view, access and download all Passport-entity related documents such as invoices, depositions, contracts, briefs, etc.

→ Add and reorder columns while in a documents list view and save custom filtered views of document lists.

→ The Passport security framework ensures users only have access to appropriate records and documents.

The SharePoint Online Connector brings together the industry-leading matter management capabilities of Passport with the scalability and configurability of Microsoft's web-based platform.

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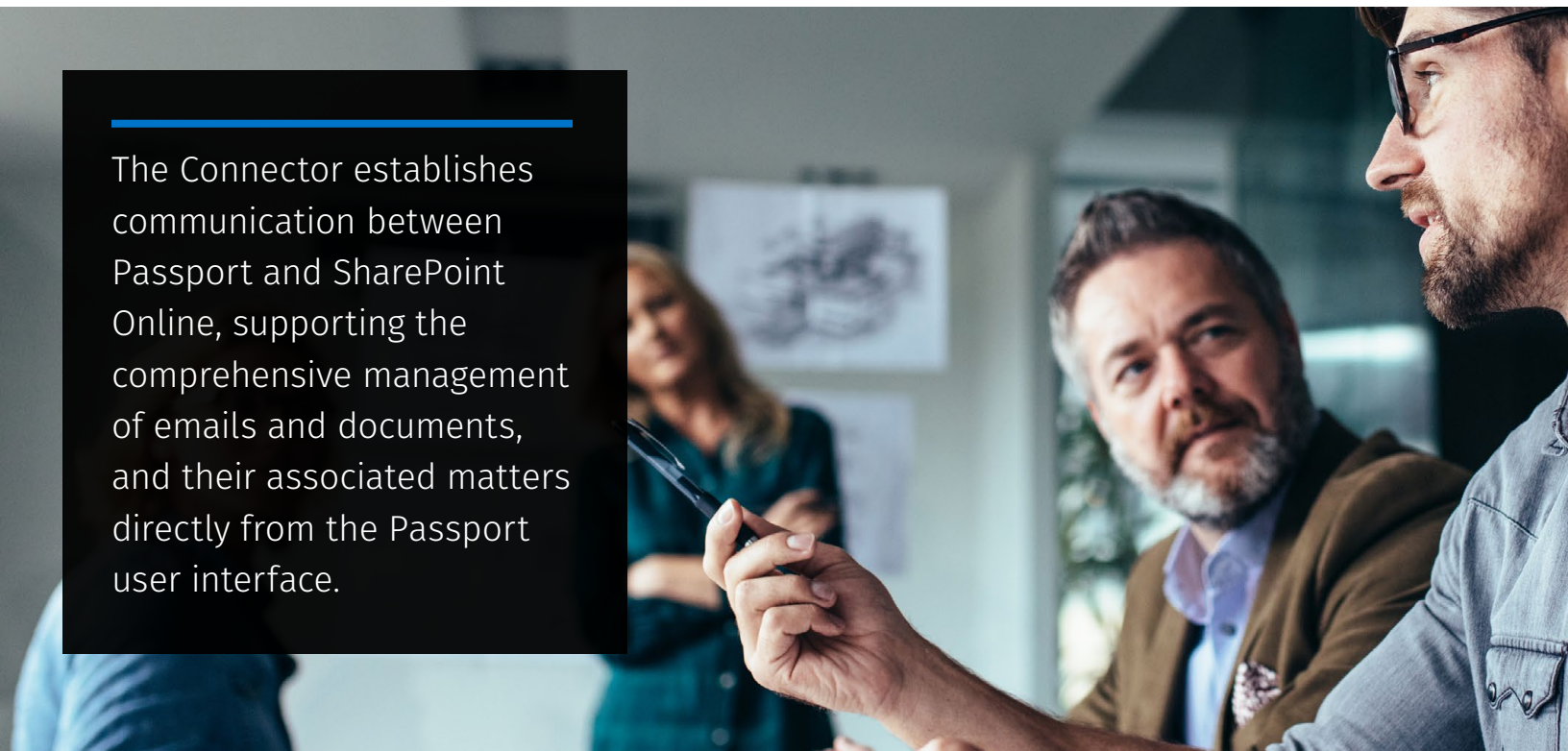**Create folders and sub-folders to organize documents and emails**

→ Allows the storage of documents across multiple SharePoint libraries.

→ Manage matter-related email messages and email folders stored on a SharePoint Online server from Passport or Outlook.

→ Supports archive and purge capabilities for documents and folders.

Collaborate and share information more easily and efficiently

→ Easily Check-In and Check-Out documents to provide concurrency control.

→ Supports preservation of multiple versions of a document on the SharePoint Online server.

→ The SharePoint Online Connector provides Passport REST API methods to create, modify, and delete Passport documents and folders.

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