

OneDrive Sync & Migration

How Trial Commander reads the client folders your firm already keeps in OneDrive or SharePoint, the order to set it up in, and how your documents follow when you move the firm across from PracticePanther or another system.

REVISED 4 OCTOBER 2026

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Part I • The short version

THE ONE-SENTENCE CASE

OneDrive stores documents. Trial Commander reads them. A PDF in a OneDrive folder is inert — it is a file with a name. The same PDF on a Trial Commander matter has been text-extracted, chunked, and indexed, which is what lets Discovery Review sweep it, the Medical Chronology cite it, the Ledger reconcile against it, and Atticus AI answer questions from it.

So the sync is not a storage feature. It is an *intake* feature: it makes the filing habit your firm already has — drag a file into a folder, or scan into one — the way documents enter the system that can actually read them. Nobody uploads anything twice.

It also closes the gap every migration leaves: an importer carries *records*, never files. The sync is how the documents follow (Part V).

Part II • What the sync adds

1 • Documents become evidence the system can read

Anything filed to a matter is text-extracted and indexed: files that carry their own text (text PDFs, Word and text files) on every paid plan, and scans on Silver and above — read by a vision model rather than classic OCR, so a photographed exhibit or a faxed record produces usable text. That is what puts it within reach of **Discovery Review** (sweeping a production for good facts and admissions, instead of you reading page 300), the **Medical Chronology** (a treatment timeline cited back to the page), the **Ledger** (bank and brokerage statements read line by line), **Atticus AI** (answers from the matter's own record) and **search** (a phrase inside a scanned PDF, not just its filename). None of that reaches a file that only sits in OneDrive.

2 • Drop-to-file

1 • DROP

A paralegal drags a PDF into the matter's folder — or the scanner does.

2 • DETECT

The next sync pass, within about fifteen minutes, sees the new file.

3 • FILE

It lands on the matter's Documents, in the same subfolder.

4 • READ

Extraction and indexing run; it becomes searchable.

Point the scanner at a matter folder, and every scan files itself on the matter.

3 • Trial Commander's own work, where you work

Some of what you make in Trial Commander is also written into the matter's folder in the drive, where it opens in desktop Word. Exactly these: an **upload into a folder** on the matter's Documents tab, if it is 4 MB or smaller (Part IX); a **Drafting Studio export** (*Export.docx* ↓), saved in the matter's *Drafts* folder; the **live drafts** you start from the matter's Drafts card (Part VII); and the document the **Word add-in's Finalize** hands to the matter's folder (by default a *Final* folder) so Microsoft can make its PDF. Other documents Trial Commander produces — generated forms, demand packages — are filed on the matter only.

Part III • What it does not do

A DELETION IN ONEDRIVE NEVER DELETES THE MATTER RECORD

A synced folder is exactly how someone destroys evidence by tidying up, and a litigation hold must not be reachable from a recycle bin on somebody's laptop. **A file removed from OneDrive is removed from OneDrive.** The matter's copy and its extracted text stay. This is not a setting.

FILES ARE READ IN ONCE

Editing a file in OneDrive after it has been filed does not change the matter's copy, and never overwrites it. If a new version belongs on the matter, save it as a new file in the folder. Only file types you could upload by hand are read in; anything else is skipped, and so is a file over the sync's size limit of 50 MB.

Not a way to share folders with clients. Sharing a matter folder with a client or co-counsel risks disclosing one client's file to another; the client portal is the place for that. This sync is firm-internal.

Part IV • Setup

Everything below happens at **Settings → Document Sync** (the page is headed *OneDrive / SharePoint sync*). A firm administrator can also open a plain-words explainer of it, showing the firm's own current state, from **Admin → Import / Migration → OneDrive / SharePoint document sync → How it works, and what to do first →**. The order matters: each step waits on the one before it, and a switch turned on before its prerequisite exists shows as on while doing nothing.

0 • MAKE THE FOLDER

In OneDrive or SharePoint, before you touch Trial Commander.

1 • CONNECT

A firm administrator signs in to Microsoft once.

2 • CHOOSE THE ROOT

Use this folder or Use this library.

3 • MAP OR PROVISION

Match existing folders to matters, or let Trial Commander create them.

4 • BACK-FILL

Folders for the clients and matters you already had.

5 • FIRST INGEST

Watch the document count move.

WHO CAN DO WHAT

Document sync comes with every plan, including the free Starter plan and the trial. A **firm administrator** connects the Microsoft account, chooses the root folder, and changes or disconnects the account.

Mapping folders to matters, folder provisioning, the back-fill and **Sync now** can also be done by anyone a firm administrator gives the *Manage OneDrive document sync* permission (**Settings → Team Members → the person → Additional permissions → Document sync**). Everyone who can open a matter sees the documents synced to it.

Step 0 • Make the folder first

Decide where the firm's client folders will live and, if you are starting fresh, create that folder yourself — in OneDrive in the browser, in File Explorer, or in a SharePoint library. The picker in step 2 can only *choose* an existing folder; it has no “new folder” button. Most firms want one dedicated folder, named something like **Clients**, rather than the root of somebody's whole drive. A PracticePanther firm usually already has one: the **PracticePanther** folder its OneDrive integration created.

Step 1 • Connect the Microsoft account

On the **Connection** card, a firm administrator presses **Connect Microsoft**, picks the account, and approves the permissions. Use an account that will outlive the person — for most firms the client folders live in a shared office account, and the connected account does not have to be your own. Connecting on its own reads nothing and changes nothing; the page says *“OneDrive connected. Next: choose the folder that holds your client files.”*

IF MICROSOFT SAYS “NEED ADMIN APPROVAL”

Trial Commander asks Microsoft for permission to read and write the files the connected account can reach, and to list — read-only — the SharePoint sites it can open. On Microsoft's default settings those are permissions your firm's own **Microsoft administrator** must approve. That person approves Trial Commander once, and then **Connect** (or **Reconnect**) goes through. When Microsoft refuses, the page says so and names both possibilities: the permissions were declined, or Microsoft stopped at admin approval.

Step 2 · Choose the root folder

The **Root folder** card offers two doors, side by side: **Browse OneDrive folders** and **Browse SharePoint libraries**. Both are fully supported, both are permanent, and neither costs more: OneDrive and SharePoint come with the same Microsoft business plan. A folder in the connected account's own OneDrive is the usual choice for a solo or small firm; a SharePoint document library suits a larger firm, or any firm that would rather the client files did not sit in one person's account.

- **OneDrive.** Click a folder's name to open it, and press **Use this folder** on the row of the folder that holds your client folders.
- **SharePoint.** The sites you follow are listed; if yours is not, search for it by name. Choose the site, then the library. Press **Use this library** to make the whole library the root, or open it and press **Use this folder** on a folder inside.

After this step the two behave identically — reading, indexing, mapping and creating folders — because a document library is a drive, and Trial Commander addresses it exactly as it addresses a OneDrive folder. Until a root is chosen, no folder is watched and none is created, even with provisioning switched on.

WHAT “SHARED WITH ME” CAN AND CANNOT FIND

When you browse OneDrive, a **Shared with me** list may appear under your own folders. PracticePanther's folder often sits there when somebody else connected its OneDrive integration. Microsoft retires its old list of shared items in November 2026, so Trial Commander now builds this list two ways: by searching for folders in colleagues' OneDrives that the connected account can open (work or school accounts), and from folders added to the connected OneDrive with **Add shortcut to My files** (every account). A folder shared in the last few minutes may take a little while to appear. It does not list folders shared from a SharePoint site — choose those through **Browse SharePoint libraries** — or folders shared from another organisation. **Personal Microsoft accounts** see shortcuts only: open OneDrive on the web, go to **Shared**, and choose **Add shortcut to My files** on the folder. If a folder in another person's OneDrive still does not appear, use **Change account** to connect as that account (Part VIII).

If *Browse SharePoint libraries* shows *SharePoint browsing not switched on yet* or *SharePoint browsing refused by Microsoft*, the card says what is missing and who fixes it. A folder in the connected account's own OneDrive works normally meanwhile.

CHOOSE THE ROOT ONCE, DELIBERATELY

Every folder provisioning creates lands under the root, in a drive people are working in today. Changing your mind later does not move anything: folders already created stay where they are and the mappings point at them. Pick it with whoever owns the drive in the room.

Step 3 · Map folders to matters — or let Trial Commander create them

If the firm already keeps a folder per client or matter, open **Propose matches** → on the **Map folders to matters** card. It reads the folders under the root and pairs them with matters, labelling each proposal:

LABEL	WHY IT MATCHED	TICKED FOR YOU?
High — matter number	The folder name carries the matter's number.	Yes
Medium — exact name	The folder name is the matter's name.	No
Low — name contains client	The folder name contains the client's name.	No

Untick anything that looks wrong — a wrong mapping files documents onto the wrong client's matter — and press **Map selected folders**. Nothing maps itself.

Below the proposals, **Map by hand** lists every folder not yet mapped. On each row:

- **Map** — type a matter name or number in the box and map the folder to it.
- **New client** — creates a client named after the folder. Its type is guessed from the name (“LLC” or “Inc” makes a business, “Estate of” an estate, a trust-instrument name a trust, “City of” or “County of” a government body, anything else an individual) and is one click to change on the client. If a client of that name already exists, it is reused and nothing new is made.
- **New matter** — creates a matter from the folder, in the practice area you pick beside the button, under the client the folder names (reused if it exists), and maps the folder to it.
- Click a folder's **name** to open it: a client folder often holds one subfolder per matter. Inside, tick subfolders and press **Create matters from checked folders** for one matter per ticked folder, all for that client.

Every matter created here goes through the same gates as *New Matter*: the firm's conflict-check requirement and its plan's matter limits. To bring a whole client across at once — the client, every matter folder, every document — use **Import client + matters** (Part V).

If the firm has no such folders, switch on **Folder provisioning** instead. From then on, creating a client in Trial Commander creates its folder under the root, and creating a matter creates the matter's folder from its practice area's template, plus a *Drafts* folder, mapped back automatically. The first time for a given root you are shown the scope in numbers — which folder, how many folders, and that switching it off later does not remove them — and you type the root folder's name and press **I have read this — switch folder provisioning on**. An existing folder with the same name is reused, never duplicated; nothing in

OneDrive is renamed or deleted. **Edit folder templates**, on the same card, sets the subfolders per practice area (one per line; blank a box to restore its default).

Step 4 · Back-fill the clients and matters you already had

Provisioning covers what is created from the moment it is on. With it on, the card's **Existing clients and matters** box counts the clients and matters that have no folder yet; **Provision missing folders** queues them for the next pass. A client counts as covered once one of its matters is mapped.

Step 5 · Let the first ingest run, then watch it

The first pass on a mapped folder reads everything in it, at any depth, keeping its subfolders as folders on the matter's Documents tab. After that, each pass — about every fifteen minutes — asks Microsoft only what changed. **Sync now** runs one immediately. The Connection card shows *N folders mapped · N documents synced · last pass ...*: that document count, not the word *Connected*, is the proof it is working. A problem with the last pass is written in red under it.

Part V · The migration on-ramp

Bringing your records in: Import / Migration

A firm administrator opens **Admin** → **Import / Migration** (also a card in Settings). The page starts with the firm's document-sync status, then:

- **Migrate from Clio — guided**: one archive instead of seven uploads, with a report of everything it would create or collide with before it writes anything, and a single undo for 48 hours. It is available when Trial Commander switches it on for your firm; until then the card says so and the per-source uploaders below work as usual.
- **Choose your source**, each running the same upload → map columns → dry run → execute flow:

SOURCE	BADGE	WHAT THAT MEANS
PracticePanther · Clio · MyCase	One-click	Columns are mapped for you from the vendor's standard exports; you confirm them. Custom fields may need mapping by hand.
Smokeball · CosmoLex	Best-effort	Sensible defaults, not yet calibrated against real exports. Check every column.
Generic CSV / Spreadsheets	Manual map	Any tool you can export to CSV or XLSX. You map each column.

Recent imports, at the foot of the page, lists earlier runs with a **View** button. For PracticePanther in particular:

CAPABILITY	DETAIL
Per-export instructions	Each data type carries the exact PracticePanther menu path — including that PracticePanther names several exports "Activities.xlsx" and you must rename them.
Auto column mapping	PracticePanther's real column names are built in, with ordered alternates so "Primary Email" beats "Email" beats "E-mail".
Dry run	Nothing is written until a full report is reviewed: record counts, mapping results, and every issue by severity.
Trust reconciliation	When you upload a trust ledger, you must enter the firm's total trust balance from the old system's trust summary, as of today. The ledger must reconcile to it to the penny , or the importer refuses to proceed.
Rollback	Seven days — refused once someone has done new work on, or edited, the imported records, because undoing would delete that work.
Parallel run	Keep the old system read-only for 30–90 days and verify before cancelling.

THE TRUST CHECK

If the imported trust ledger does not balance to the penny, the import stops. If the *source* data shows a matter's trust balance going below zero at any point in its history, the dry-run report flags that transaction, naming the matter and the date, and the importer will not import it. The transaction was flagged as potentially inconsistent with Rule 5-1.1 compliance requirements — surfaced before your first day on the system rather than during an audit, and not a finding that a rule was broken.

ON THE FREE STARTER PLAN, AN IMPORT OBEYS THE PLAN'S LIMITS

Starter allows 15 open matters, and 30 matters opened in any twelve months. An import that would go past either is refused **before anything is written** — all or nothing, because a partial import would leave time entries, invoices and trust rows pointing at matters that were never created. Imported matters count toward the 30 even if they were closed years ago in the old system. The refusal names the limit, the room left, and offers **Upgrade plan** →; after an upgrade the same **Execute import** button runs it. Re-running an import already brought across adds no matters and is not refused. Bronze and the plans above it have no matter limit.

Documents: the importer carries records, not files

A CSV export carries *records* — contacts, matters, time, invoices, payments, trust. It cannot carry files. The OneDrive sync is how the documents follow, and it suits the way many PracticePanther firms already work: their documents are *already* in the firm's own OneDrive, organised by matter, because PracticePanther's OneDrive integration put them there. You do not need PracticePanther to hand them over, and you do not need to keep paying it for read-only access to your own PDFs: point the sync at the folder you already have.

Importing a whole client — one click, or several at once

Under **Settings** → **Document Sync** → **Propose matches**, every client folder beneath the root has an **Import client + matters** button, and a tick box for choosing several at once (up to 25 per import) with **Preview the import of checked clients**. Either one opens a **preview**. Nothing is created until you press **Import** at the bottom of it.

- **What comes across.** The client folder becomes the client. Every folder inside it becomes a matter — numbered under the firm's own scheme, with the practice area chosen for it in the preview (General Litigation unless changed) — and that folder is linked to the matter. Every document beneath the matter folder follows, at any depth, and its subfolders appear as folders on the matter's Documents tab: *Pleadings/Motions* in OneDrive is *Pleadings › Motions* on the matter.
- **Shapes that do not fit, handled on purpose.** A client folder with no subfolders comes across as one matter named after the client folder. Documents sitting directly in a client folder that also has matter folders are counted in the preview and left where they are — a document belongs to a matter, and guessing which one is how a file lands on the wrong case.
- **Numbers before anything is created.** Per client: the name that will be used, each matter folder, and the documents and subfolders under each.
- **“Already imported.”** When the folder is already a record here — the client an earlier import made from it, or a matter folder already linked to a matter — the preview says so and names the record. The default is *Skip*. A matter folder can instead be synced again, which re-reads its whole tree and never files a document twice.
- **“This may be a duplicate.”** When nothing links the folder to a record but a record looks like it — “Rivera, Ana” beside “Ana Rivera”, a compound surname with one half missing, a matter number or Florida case number inside the folder name — the preview says it may be a duplicate, shows the existing record with its matter count and numbers, and offers: use the existing client (or link the folder to the existing matter), create a new one anyway, or skip. *Skip* is the default. Every choice is written to the audit log, including a record created despite the warning.
- **Never a merge.** The import never merges or deletes anything. Two records that turn out to be one client are combined with **Merge** on the client's page.
- **The gates stay where they were.** Firm administrators, or whoever holds the *Manage OneDrive document sync* permission; the conflict-check requirement and the plan limit apply to every matter created; a folder still maps to exactly one matter.
- **Timing and the result.** Clients, matters and folder links are created at once; documents arrive on the next sync pass (about fifteen minutes) or with **Sync now**. The result page lists every folder as created, linked, syncing again, skipped or failed, with the reason — one client folder that cannot be read does not stop the others.
- **“Imported” on the folder list, and Hide imported clients.** On *Propose matches*, a client folder already imported is labelled *Imported*, by the same check the preview uses. A **Hide imported clients** switch — on by default, remembered in **this browser** (so per device, not per person, and not a firm setting) —

hides the ones with nothing left to do and says how many it is hiding. A client folder with matter folders not yet in Trial Commander is **never hidden**: it reads, for example, *Imported · 2 new matter folders*, and importing it again brings only those across while the rest show as already imported. What is inside each client folder is listed at most once every ten minutes — the page says when it was listed, and *re-listing the folders* reads them fresh.

SUBFOLDERS INSIDE A MATTER FOLDER

A matter folder is read at every depth. Its first read lists the whole tree; after that, Microsoft's change feed is trusted for the folder only if it returned every nested document the listing found. If it did not, the folder keeps being read by listing, and **Sync now** says so.

Part VI · Worked example: a PracticePanther firm moves across

Assume a small Florida firm on a paid plan: two attorneys, three staff, about 180 open matters, an IOTA trust account, and PracticePanther's OneDrive document integration already switched on — so

`OneDrive/PracticePanther/` holds a folder per matter, named the way PracticePanther names them.

Day 0 — Preparation

1. The firm administrator opens **Admin → Import / Migration → PracticePanther** and reads *Before you begin* and the migration packet it links to.
2. They pull the firm's total trust balance from PracticePanther's own trust report and write it down. This is the number the importer will be held to.
3. PracticePanther is set to read-only for everyone except the administrator, so no new work lands mid-migration.

Day 1 — The records

1. Seven exports out of PracticePanther: contacts, matters, trust ledger, time entries, expenses, invoices, payments — each renamed on download, because PracticePanther calls several of them the same thing.
2. All seven uploaded. Column mappings are suggested from PracticePanther's layout; the administrator confirms them and enters the trust total from Day 0.
3. **Dry run.** Record counts, mapping results, issues by severity, and the trust reconciliation. Nothing has been written.
4. Trust reconciles to the penny. **Execute import.**

Day 1, second half — The documents

1. **Settings → Document Sync → Connect Microsoft.** One Microsoft sign-in, as the account whose OneDrive holds the **PracticePanther** folder.
2. **Browse OneDrive folders**, then **Use this folder on** **PracticePanther**.
3. **Propose matches.** The matters were just imported with their PracticePanther numbers and names, so the folder names and the matter records came from the same source and still agree. The confident matches arrive ticked; check the medium and low ones one by one, then **Map selected folders**.
4. **Sync now**, or wait for the next pass. Every document lands on its matter and enters the extraction pipeline. Scans are transcribed; everything becomes searchable.

WHY THE ORDERING MATTERS

Records first, documents second. The import creates the matters whose names and numbers the folder matcher relies on — the migration supplies the mapping key for free. Run the document sync first and there is nothing to map folders *to*.

Days 2–30 — Parallel run

1. The firm works in Trial Commander. PracticePanther stays read-only.
2. New documents drop into the same OneDrive folders the staff already use; they arrive on their matters without anyone learning a new habit.
3. The firm verifies: trust balances, invoice totals, a sample of matters opened side by side.
4. Rollback stays available for the first seven days, and is refused once new work exists on the imported records.

Day 31 — Cancel

With the documents carried across, there is no read-only archive to keep paying for. The firm cancels PracticePanther.

What still does not come across

Worth saying to any firm, because a migration that oversells itself gets found out in week two. The importer does not carry calendar events, notes and memos, tasks, custom fields, emails, contact relationships, or historical user assignments — entries by former staff are attributed to the firm administrator. Credit memos are rejected and added by hand. Practice areas and expense categories are best-effort mapped, with unknowns falling to sensible defaults. Recreate the dates that still matter in Trial Commander's own calendar and deadlines.

Part VII · Live drafts in Word and Excel

Once the firm has OneDrive connected, each matter's **Documents** page has a card headed **Drafts — live in Word & Excel**. Anyone who may edit the matter (*Edit matter details*) can use it; since 4 October 2026 a person who can only open the matter is refused, and told which switch would let them.

1 · NAME IT Type a <i>Document name</i> , such as “Demand letter”.	2 · CREATE W New Word draft or X New Excel draft.	3 · WRITE Open ↗ opens it in real Word or Excel. It saves as you go.	4 · FINALIZE Moves it out of Drafts and files it on the matter.
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- **Where it lives.** The file is created in the matter's *Drafts* folder in OneDrive. The card lists each open draft with its type and date.
- **Off the record until you finalize.** The sync does not read the Drafts folder, so a draft never becomes a document on the matter by accident. **Finalize** moves the file into the matter's folder and files it on the matter's Documents at once; if Microsoft is slow to answer, it files on the next sync pass instead.
- **Still open in Word?** Finalize then says the draft *“is still open in Word/Excel. Close that tab, give autosave a few seconds, and click Finalize again.”*
- **Drafting Studio exports land here too.** On a mapped matter, *Export .docx* ↓ in the Drafting Studio also saves the document in the Drafts folder, where it appears on this card with its own **Open ↗**. Your download works the same whether or not that copy could be written.
- **A matter with no folder.** The card reads *“This matter has no OneDrive folder mapped yet, so drafts have nowhere to live. A firm admin can map one in Settings → Document Sync — new matters get a folder automatically when folder provisioning is on.”*

Part VIII · Changing the account, and trouble

Change account — not Disconnect

To move the sync to a different Microsoft account — a departing lawyer's account to the office account, say — a firm administrator presses **Change account** on the Connection card. Before Microsoft is involved, the page explains what the change does, with your firm's own root folder and number of mappings in the sentences; **Continue to Microsoft** goes on to pick the account. Trial Commander then checks for itself whether the new account can open the same folders:

- **It can** (*Account changed — same folders*): the root folder and every mapping are kept. Nothing needs redoing.
- **It cannot** (*Account changed — the mapped folders are unreachable*, marked **Sync paused**): nothing is unmapped and no document is removed, and the sync and folder provisioning wait for a firm administrator. Either give the new account access to the folders in Microsoft and press **Keep the root folder and all mappings — resume the sync**, or — as a last resort — type the confirmation and press

Clear the root folder and all ... mappings, which deletes nothing in OneDrive but means matching folders to matters again. Connecting again as the previous account puts everything back.

Reconnect means the same account again, after a password change or a revoked grant; it keeps everything.

DISCONNECT FORGETS THE ROOT AND EVERY MAPPING

Disconnect keeps every document already filed on its matter, but the root folder and all the folder-to-matter mappings are gone: connecting again starts from choosing a root and mapping every folder. To move the sync to another account, use **Change account** instead.

Trouble

WHAT YOU SEE	WHAT IT MEANS, AND WHAT TO DO
Microsoft shows “Need admin approval”	Your firm's Microsoft administrator approves Trial Commander's permissions once; then Connect or Reconnect goes through.
Connected, but nothing is syncing	Connected is not syncing. Check a root folder is chosen and folders are mapped, then press Sync now and watch the document count.
A file never arrived on the matter	It may be over the 50 MB size limit, a type you could not upload by hand, or in a folder that is not mapped — or in <i>Drafts</i> , which is not read.
I edited a file in OneDrive and the matter still has the old one	Files are read once. Save the new version as a new file in the folder.
I can't find the PracticePanther folder	It may be under Shared with me , in a SharePoint library, or in another person's OneDrive. If it is not listed, add it with Add shortcut to My files in OneDrive on the web, or use Change account to connect as that account.
I can't rename a folder or move a document	It holds files that live in OneDrive; do it in OneDrive (Part IX).

Part IX • One folder tree, in the app and in the drive

In-app uploads and synced files share one folder tree on each matter, organised by the practice area's template. That raises one question, which this part answers: **when the app and the drive could each have an opinion about where a file lives, which one is right?**

1 • The drive always wins

Every document carries at most two ideas of its own location, kept apart on purpose:

LOCATION	WHAT IT MEANS	WHO SETS IT
Where the drive says it is	Where a synced file <i>really</i> sits in the firm's OneDrive, under the matter's mapped folder. A report, not a decision.	The sync, and the mirror in section 3. Never changed by a folder action here.
Where someone filed it here	Where somebody filed an in-app upload. A decision made inside Trial Commander, which exists whether or not the firm uses OneDrive at all.	The upload form and the Move action.

A synced file's folder is whatever the drive says it is, every time; an in-app upload falls back to the folder chosen here. There is no reconciliation step, because the two never both describe a choice: one of them is a fact about somebody else's system.

THE TEMPLATE IS ALSO THE IN-APP FOLDER LIST

The practice area's folder template is what a matter's Documents tab shows from the day the matter opens — a personal-injury file lists **Medical Records, Bills & Liens** and **Experts** before anything has been filed. A firm edits it per practice area at **Settings** → **Document Sync** → *Edit folder templates*, and the edit changes every matter in that area at once, with nothing to migrate.

2 • What the app refuses to do to a synced file

Two actions are refused when a synced file is involved, and both refusals name OneDrive as the place to do it instead — otherwise the app would state something about the drive that the drive never agreed to.

ACTION	WHAT THE PERSON IS TOLD
Renaming a folder that holds synced files	<i>"Discovery" holds 4 files that live in this firm's OneDrive. Renaming the folder here would disagree with the drive — rename it in OneDrive instead.</i> The count is real, and the same folder renames without complaint once it holds only in-app uploads.
Moving a synced document	<i>"MRI report.pdf" lives in this firm's OneDrive, so its folder is set by the drive. Move it in OneDrive and the change is what everyone sees.</i>

3 • An upload into a folder is written into the drive

Where the firm has the sync on and the matter mapped, filing a document into a folder inside Trial Commander puts it in that folder in OneDrive too, so the file is where the firm expects it in both places.

1 • UPLOAD

Somebody uploads a PDF into **Medical Records** on the matter's Documents tab.

2 • FILED HERE FIRST

The document is filed on the matter at once. Everything below happens afterwards, in the background.

3 • WALK THE PATH

Each folder is created in the drive, or reused if it already exists — never duplicated as "Medical Records 1".

4 • RECOGNISED

The next sync pass knows the file is already filed and does not file it twice.

THE MIRROR IS A BONUS, NEVER A REQUIREMENT

A firm with no OneDrive, no mapping, or a Microsoft outage gets the document filed in Trial Commander in the folder they chose, with nothing else changed. The upload is never held up waiting for Microsoft.

4 • What is not mirrored, and why

CASE	WHAT HAPPENS
An upload over 4 MB	Filed in Trial Commander as usual, but not copied into the drive: an upload from the Documents tab uses Microsoft's simple upload, which takes 4 MB at most. A truncated file in the drive would be far worse than no file.
An upload filed at the matter's root	Nothing to mirror: the mapped folder already <i>is</i> the root.
Creating a folder	A folder made in the app appears in the drive when the first file is filed into it.
Deleting a folder	Only an empty folder can be deleted here, and nothing in the drive is touched: Trial Commander never deletes anything in OneDrive.
A move or a rename	Refused for synced files (section 2); for in-app uploads it changes only this side, which is the only side that had an opinion.

Part X • Quick reference

WHERE	WHAT IS THERE
Settings → Document Sync	Connection (<i>Connect Microsoft, Sync now, Reconnect, Change account, Disconnect</i>), Root folder, Map folders to matters, Folder provisioning and templates, Mapped folders, and <i>The rules, plainly</i> .
Admin → Import / Migration	The document-sync status card with <i>How it works, and what to do first</i> →; the guided Clio migration (when switched on for your firm); the per-source importers; Recent imports.
Matter → Documents	The synced files in their folders, and the <i>Drafts — live in Word & Excel</i> card.
Settings → Team Members → a person	<i>Additional permissions</i> → <i>Document sync</i> : lets that person map folders, provision and run Sync now.

THIS GUIDE DESCRIBES THE PRODUCT AS OF THE DATE ON THE COVER AND IS NOT LEGAL ADVICE. THE SAME FEATURE IS SUMMARISED FOR STAFF IN THE FEATURES MANUAL, UNDER “ONEDRIVE / SHAREPOINT DOCUMENT SYNC”.