



End-to-end digitisation with Microsoft 365

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More and more organisations are looking to digitise their paper documents and store them within Microsoft 365. It sounds simple, but we've seen too many projects introduce unnecessary complexity, delays and costs due to the misalignment between multiple suppliers and internal resources.

With **encodian** and **Oasis'** end-to-end service, you will avoid these headaches. Benefiting from expert guidance through every stage, you'll ensure your project goes to plan first time.



Why working with **encodian** is easy



We start with the end-user experience

Our experts design your user centric digital solution first, which informs your scanning and processing strategy. Helping you to avoid unnecessary costs such as AI processing for documents your employees rarely access or a need to re-scan important documents when renditions don't meet end-user requirements.



We offer strategies for every scenario

Combining state of the art physical infrastructure with a solution built on top of Microsoft 365, we are one of the only providers with the flexibility to deliver solutions for every scenario. From intelligent AI classification for documents, to tailored forms and workflows via the market leading Power Platform.



We provide skilled project management

Our end-to-end service means you aren't required to manage multiple suppliers and internal resources with complex independencies. We provide you a single project plan and certified project management resource, ensuring your delivery is on-time and on-budget.

encodian Filer

Intelligent document and records management for SharePoint Online and Microsoft 365

Do you love **SharePoint** as a document repository and collaboration space, but find it's difficult to maintain structure and search is too open ended, thus you can't find your content?

encodian Filer is an enterprise-grade add-on for **SharePoint Online** which delivers an enhanced solution for filing, managing, and accessing documents and records, delivering a superior end-user experience that is easy to maintain.

SharePoint

- ✗ Clunky viewing experience
 - ✗ Content sprawl and duplication
 - ✗ Missing metadata
 - ✗ Misfiled documents
 - ✗ Limited personalisation
 - ✗ Limited **Outlook** integration
 - ✗ Bespoke third-party integrations
 - ✗ Complex implementations
 - ✗ Difficult to replicate across departments
 - ✗ Costly to build and maintain
 - ✗ Minimal support for scanned documents
 - ✗ Minimal PDF format support
 - ✗ Manual annotation and redaction
 - ✗ Limited **Power Automate** integration
 - ! Automated retention and disposition
- (only available with E5 licencing plans)

SharePoint + Filer

- ✓ Single view and instant document access
- ✓ Organised classification structure
- ✓ Automated metadata capture
- ✓ Automated document filing
- ✓ Bookmarks, predefined and contextual views
- ✓ **Outlook App** for email/attachment filing
- ✓ Low-code or native third-party interfaces
- ✓ OOTB standardised implementation
- ✓ Easily scalable through configuration
- ✓ Inclusive support and updates
- ✓ Direct ingestion of scanned documents
- ✓ PDF conversion and manipulation
- ✓ Annotations and redaction for PDFs
- ✓ Enhanced integration via **encodian Trigr**
- ✓ Automated retention and disposition

Who are encodian?



encodian is a multi-award-winning Microsoft Partner with proven expertise in helping businesses of all sizes to maximise their investments in **Microsoft 365**, **SharePoint**, **Power Automate**, **PowerApps** and **Azure**.

encodian Filer

Enhanced end-user experience

A superior user interface which allows users to more easily search, locate and explore records or documents in context (HR personnel file, projects, legal matters, cases, etc.)

The screenshot shows the encodian Filer interface on a laptop. The interface includes a search bar, a navigation pane, a main content area with a table of documents, and a document viewer. Callout boxes point to various features:

- View & edit metadata:** Points to the document details section showing fields like Activity Code, Invoice Number, Customer Name, and Date of Incident.
- Unique demographic data:** Points to the 'Locations' and 'Sections' filters.
- Configurable case sections & breadcrumb:** Points to the breadcrumb navigation at the top of the document viewer.
- Pan, zoom, & page thumbnails:** Points to the document viewer's navigation controls.
- Edit any document supported by SharePoint:** Points to the document list table.
- Advanced refinement search:** Points to the search bar.
- Annotation & redaction:** Points to the document viewer's editing tools.
- Document viewer:** Points to the document preview area.
- OCR Search:** Points to the search bar.

Why Filer?

- Enhanced end-user experience
- Faster to implement
- Easier to scale and maintain
- All data remains within Microsoft 365
- Cloud-based solution
- Cost efficiency vs third-party EDRMS

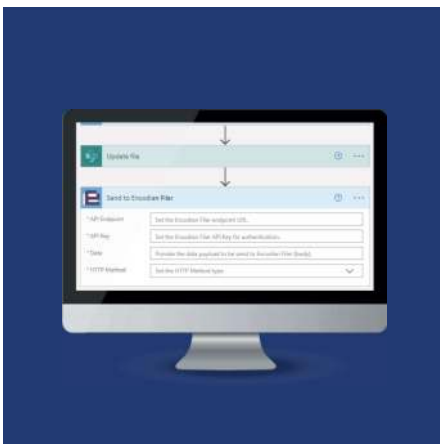
encodian Filer

More features



Outlook integration

Filer's Outlook Add-in allows users to interact and save documents directly from **Outlook** to **Filer**. Making it easy to save emails and attachments with associated metadata directly from **Outlook** to **Filer** for organised storage.



Low-code integration

Filer has a **Power Automate** connector accessible with all levels of **Microsoft Power Automate** licensing. The connector enables **Power Automate** flows to send documents direct to **Filer** for storage and classification, amongst a range of other features.



Intelligent document filing

Filer's native connectors, **Outlook** Add-in and OpenAPI allow for documents from any source to be ingested using a standards-based mechanism. **Filer's** routing engine then automatically files documents based on metadata.

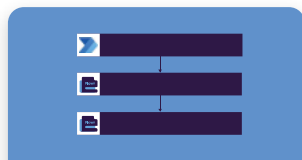
encodian Filer


More about encodian

encodian supports strategic Microsoft 365 adoption through both products and services. **encodian Filer** enables end-to-end digitisation of paper records within M365, whether for departments such as HR, estates, and finance or for digital patient records.


encodian Flowr is the number one document automation connector on Microsoft's workflow automation platform, **Power Automate**. Our Services enable NHS trusts, local governments and private organisations to complete digital transformation through best practice adoption of the Microsoft Platform. We help eradicate functional gaps through wrap-around apps and automations, leveraging your existing Microsoft licensing and our expertise in clinical app delivery, bi-directional clinical integration and back-office process automation. We look forward to helping you through your digitisation journey!


Other Products




Flowr 


Our Power Automate Connector



Trigr 

One flow for multiple SharePoint sites



Vertr 

Convert SharePoint documents



Indxr 

OCR your PDF documents

Services

Support Services

- Microsoft 365 Support
- Application Support
- Managed Power Platform Support
- SharePoint Support

Consultancy Services

- Microsoft 365
- Collaboration
- Power Platform
- Risk & Compliance Management
- Employee Experience
- Bespoke Development
- Adoption & Change Management

encodian Filer

FAQs

Does Filer replace SharePoint?

Not at all – SharePoint has some fantastic tools for productivity and collaboration you will still utilize.

Can I utilize the Power Platform with Filer?

Yes – encodian Flowr provides the ‘Send to Filer’ action which allows direct document and content submission from any source using Power Automate (which works with any Microsoft licensing).

What is Filer’s workflow engine?

Power Automate

What is Filer’s Data capture engine?

Power Apps or Microsoft Forms, in fact anything as it’s fully integrated to Power Automate allowing data to be consumed from pretty much anywhere!

How can I integrate third-party line of business systems?

Filer has an OpenAPI – almost all modern day systems will be capable of API integrations (3-10 days work).

How does Filer secure my data?

All your data never leaves your Microsoft tenant and therefore all your IT Governance settings apply to Filer.

Does Filer enable Subject Access Requests/GDPR compliancy?

As part of the Microsoft 365 platform you will be able to use Purview’s capabilities. In addition to this, Filer has the capability to redact and share specific documents to third parties with the ‘data room’ feature.

When should I use Filer’s retention/policy management engine?

Not all Microsoft licensing offers this capability – in these scenarios you would use Filer’s engine.

Can I have a free demo environment?

Yes, please reach out to us directly to work with you to provide an appropriate environment.