

OASIS



FileSmart

One place to manage all your digital documents,
built on Microsoft tools you already own

Manage your documents, not yet more IT systems

Agreeing on the ideal digital document management system is hard, when different teams have different goals. Records managers need tailored functionality to suit their document types, governance and processes. IT teams want to limit the number of standalone systems and maximise ROI on what they've already bought.

With OASIS FileSmart, everyone's happy. The system is based on Microsoft tools you already own, so it's customised to your organisation.

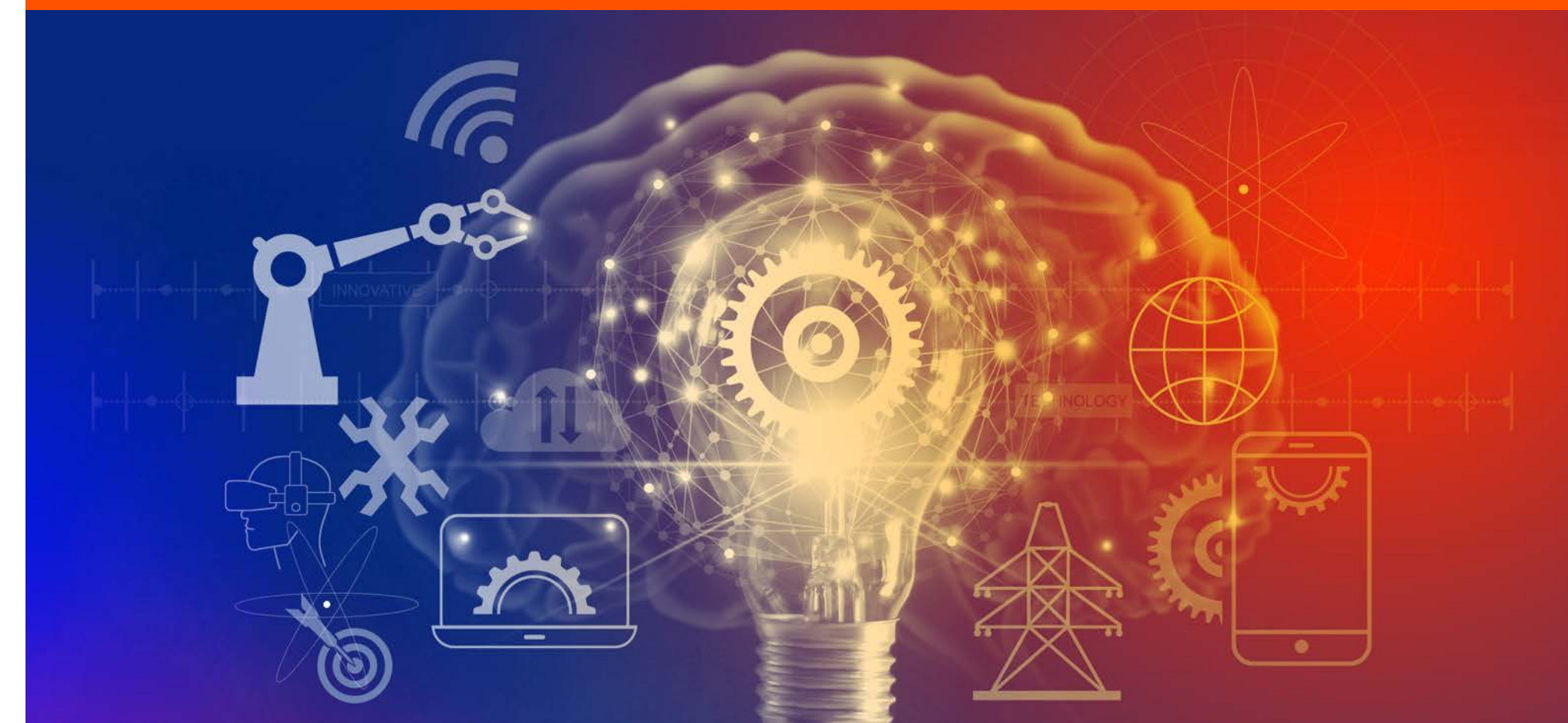
Chances are, you're already using Microsoft 365 and SharePoint. But out of the box, they're missing some of the elements you need for efficient records

management. OASIS FileSmart is an enterprise-grade add-on that can deliver substantial cost savings compared to buying separate platforms. It converts SharePoint Online into a powerful system to organise, categorise, view and manage all your documents in a single place – your documents, your platform and your permissions.

We'll customise FileSmart to the way you work: displaying tabular data for finance teams, or creating specialist document viewers for medical records teams, and all with inbuilt tagging and filing that ensures users documents remain compliant without you having to lift a finger.

Why OASIS?

Our 1,700 team members work with clients across Europe, in some of the most highly-regulated sectors, to improve efficiency, security and decision-making through more intelligent records management. Our services are certified to the highest standards, including ISO 27001, ISO 22301:2019 and Cyber Essentials Plus. We help organisations rethink services like storage, scanning and digitisation to contribute to their broader business goals. Integrating OASIS FileSmart into an end-to-end information management service means your files are always correctly set up, from digitisation to filing to ongoing process workflows.



How it works

OASIS FileSmart overcomes the most common problems organisations face when managing their digital records libraries.

"We're paying twice – once for Microsoft SharePoint and again for a purpose-built EDRMS (electronic document and records management system)."

Many organisations don't have the internal IT resource, time or consultancy budget to adapt Microsoft tools, or aren't aware of the full power of the SharePoint solution. When they invest in a separate EDRMS, they find costs spiralling for every tailored add-on or change request. OASIS FileSmart is a cost-effective way of customising the Microsoft tools you already own and adding a user-friendly interface to make it easier for your team to use.

"Our industry has very specific compliance requirements that aren't supported within a SharePoint solution."

We work with some of the most highly-regulated industries including healthcare, legal, and financial services. Our team uses OASIS FileSmart to create bespoke processes to support sector and organisational nuances. For example, we created functionality for the 'break glass' procedure for healthcare clients, which allows confidential data to be accessed immediately in a medical emergency.

"Our existing EDRMS is time-consuming to use and doesn't support management reporting."

Document management systems that are built from scratch rely on the supplier's in-house technical capabilities and upgrades to make them fit for purpose. OASIS FileSmart uses Microsoft capability – for instance, drawing on its powerful search functionality to give you an instant, organisation-wide view of your data.

"We're struggling to digitally transform because our document management system doesn't talk to other parts of the organisation."

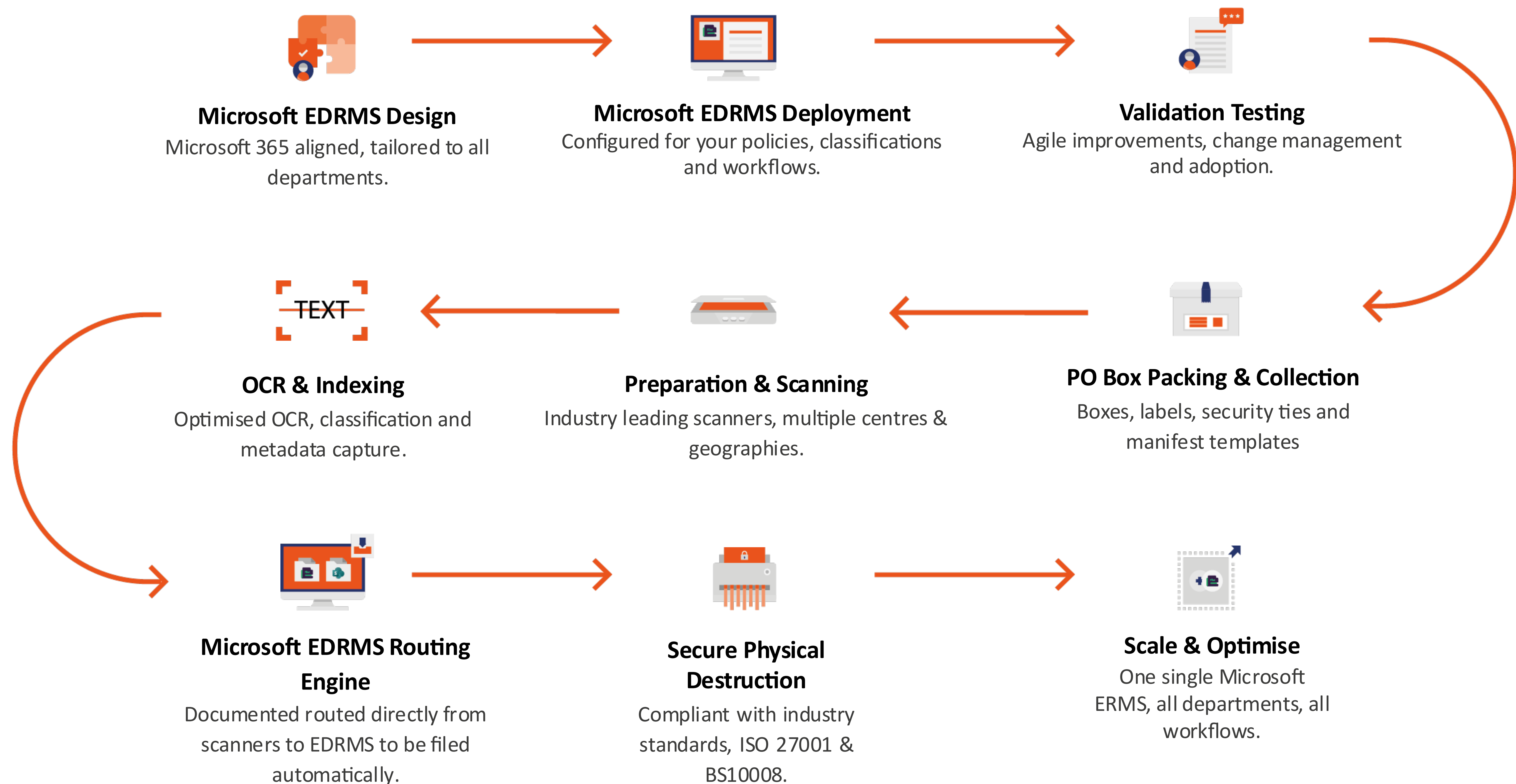
OASIS FileSmart speeds up the process of digitising your documents because it's 100% tailored to the way your business works. It works within your existing Microsoft 365 environment. The Outlook plug-in means your team can save attachments directly from their emails. And it supports your digital process workflows through its comprehensive Power Automate connector and API plug-ins.

"We're locked in with our document management vendor which is restricting what we can do, and where our documents are held."

With OASIS FileSmart, you're not locked into a third-party system. Your documents and data are held within your own environment – and one which you can give any vendor access to if you ever decide not to renew your OASIS contract.

The step-by-step process

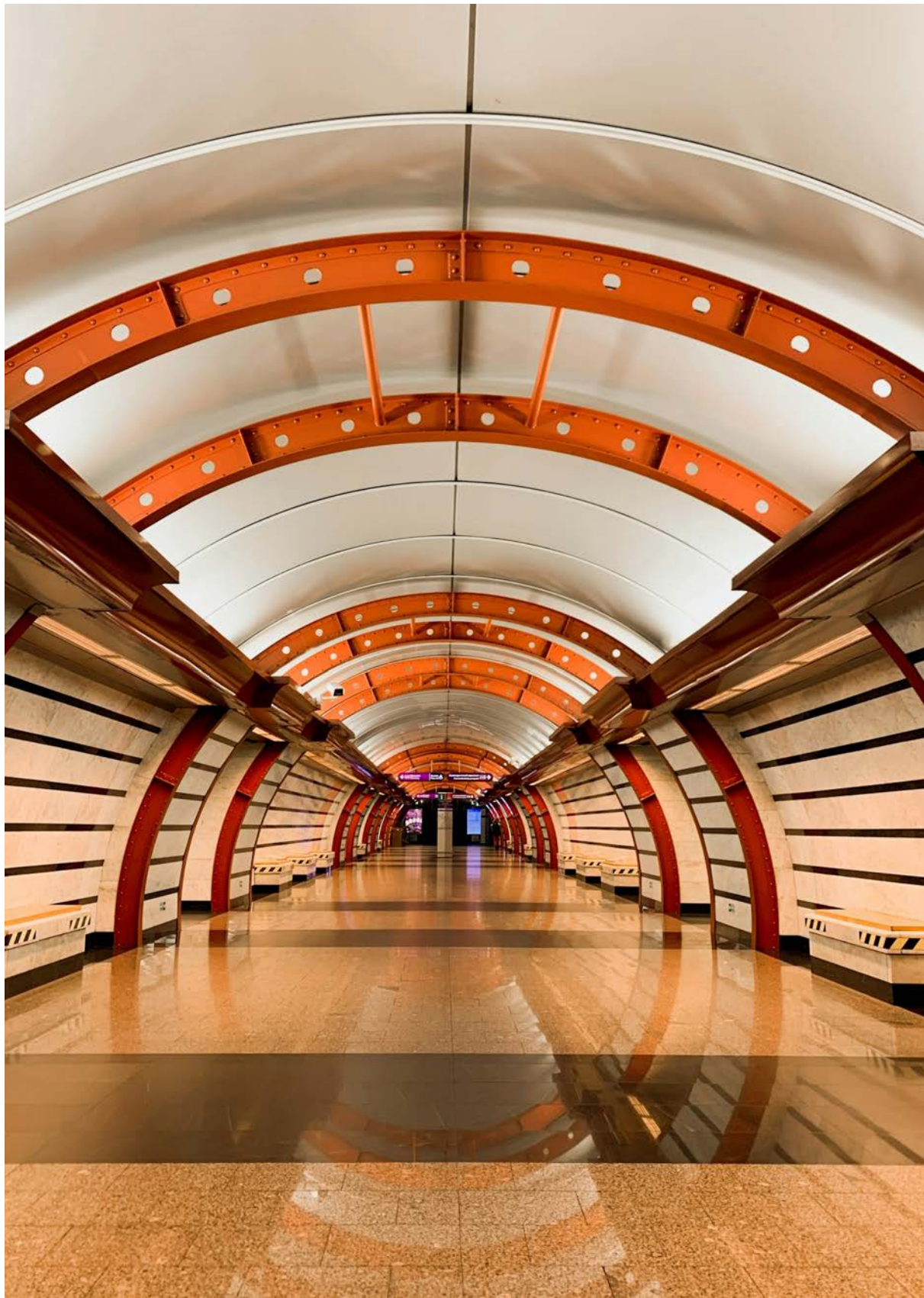
Standalone document management systems can lead to lost or badly-categorised files and duplication of effort. Keep costs down and efficiency up with OASIS FileSmart as part of your integrated service.



Features that remove friction from document management

If managing your organisation’s digital documents is taking too much time and effort, you need OASIS FileSmart. Records management and IT teams at small businesses, large enterprises and public sector organisations rely on us to keep their workflows running smoothly.

FEATURE	THE DIFFERENCE IT MAKES
WORKFLOW AUTOMATION	Connect OASIS FileSmart to Microsoft Power Automate so documents can be automatically classified and stored. The intelligent document processing (IDP) module also integrates with Outlook and API integrations to make it easier to index and classify documents with the right labels and policies.
OUTLOOK INTEGRATION	Make life easier with the Outlook Add-in. Your team can instantly save or attach documents from emails into the OASIS FileSmart system so they’re correctly stored and searchable.
DOCUMENT EDITING	View, annotate, redact and comment on documents from within the system.
DIGITAL BRIEFCASE FOR SARS AND AUDITS	Collate files and documents, redact and annotate them, apply custom retention and access rules, and share securely.
SCAN ON DEMAND BUTTON	Request scans of your hardcopy documents from within OASIS FileSmart with the scan on demand button.
REGULATORY COMPLIANCE	Apply and view retention policies, including soft delete, hard delete, and custom workflows.



Take a peek at the system

It's SharePoint – but not as you know it. Make life easier for all teams and functions, with a single, easy-to-use, fully-compliant place to manage all your organisation's digital documents.

The screenshot displays the 'Records Management Demo' interface within a SharePoint environment. The interface is divided into several sections, each highlighted by an orange callout line:

- Metadata banner (APIs available)**: Points to the top header area of the document viewer.
- Request Files 'Scan on Demand'**: Points to the 'Request Files' button in the top right corner.
- Digital Briefcase for SARs and Audits**: Points to the 'Digital Briefcase' button in the top right corner.
- Advanced search refiners**: Points to the search bar and filters on the left side of the interface.
- Annotate, Redact and Comment**: Points to the 'Annotate', 'Redact', and 'Comment' buttons in the top right corner of the document viewer.
- OCR Search**: Points to the 'OCR Search' button in the top right corner of the document viewer.
- Document viewer**: Points to the main document content area on the right side of the interface.
- View & edit metadata**: Points to the 'View & edit metadata' button in the top right corner of the document viewer.
- Document controls & automations**: Points to the 'Document controls & automations' button in the top right corner of the document viewer.

The interface also includes a table of documents with columns for Title, Document Type, Created, and Expiry Date. The table lists various documents such as 'Contract Overview', 'Trial Model Summary', 'Quarterly Revenue Report', 'Property Management To-Do List', 'Property Appraisal Summary', 'Partnership Agreement Summary', 'Maintenance Tools List', 'Legal Case Result Overview', 'Key Findings Compilation', 'Important Legal Decisions Summary', 'Home Evaluation', 'Company Merger Analysis', 'Business Integration Review', and 'Annual Sales Summary'.

Frequently asked questions

Would we use OASIS FileSmart instead of SharePoint?

No, the two are complementary: most clients continue to use SharePoint's productivity and collaboration capabilities.

Do Microsoft tools like Power BI, Power Automate and Power Apps work with this system?

Yes. You can create document workflows using Microsoft's Power Platform, with documents automatically routed into OASIS FileSmart as the final step.

How is data captured?

The system can use Power Apps and Microsoft Forms, and as it's fully integrated with Power Automate, data can be captured from almost anywhere.

Can I integrate other, third-party systems?

Yes: OASIS FileSmart uses an OpenAPI, meaning it can integrate with almost any modern system (allow 3-10 days work).

How do you keep my data safe?

Data never leaves your Microsoft tenant and is therefore within the remit of your current IT governance settings.

Can the system help with Subject Access Requests (SARs) and GDPR compliance?

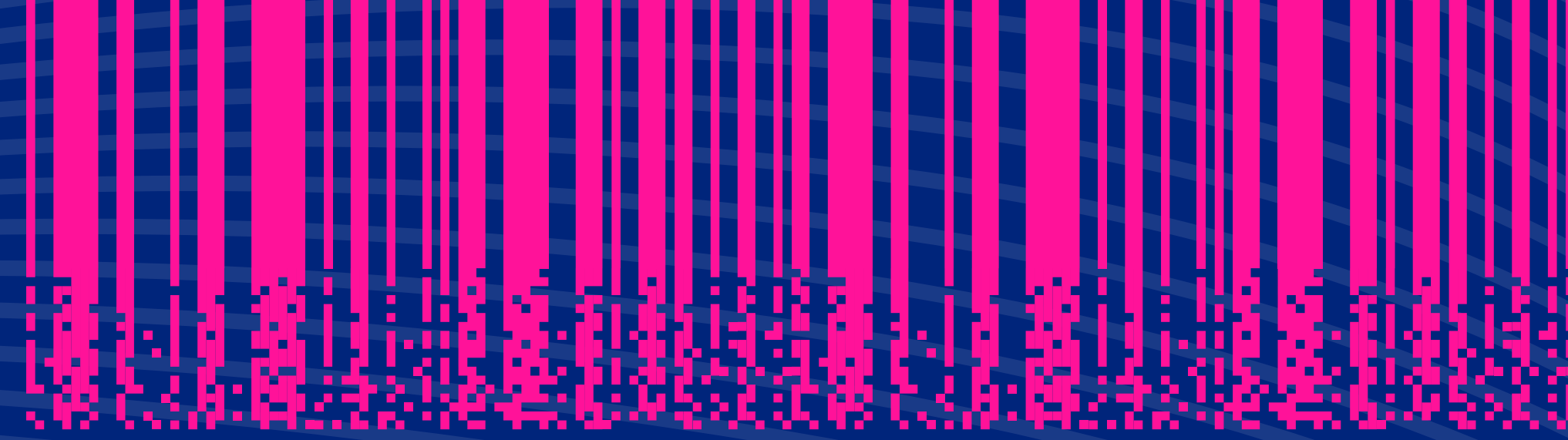
Yes, with the 'briefcase' feature you can quickly create document packs for SARs and audits. The briefcase is a secure copy of relevant documents that can be edited, redacted and shared – with custom retention and access rules applied.

When would I need to use the system's retention and policy management engine?

This feature is useful if your existing Microsoft licenses don't offer this capability.

Is it possible to trial the system in a demo environment?

Absolutely, our team can set that up for you.



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