OASIS
Information Secured

UK local authority demonstrates legacy EDRM replacement with Microsoft 365 & FileSmart

Executive summary

The following summary shows how the organisation transformed outdated records management into a streamlined, cloud-enabled service.

A UK local authority successfully modernised its information management infrastructure by replacing an ageing Electronic Document and Records Management (EDRM) system with a cloud-based solution combining Microsoft 365 and FileSmart.

This transformation delivered improved accessibility, enhanced security, reduced costs, and positioned the organisation for future digital service delivery.
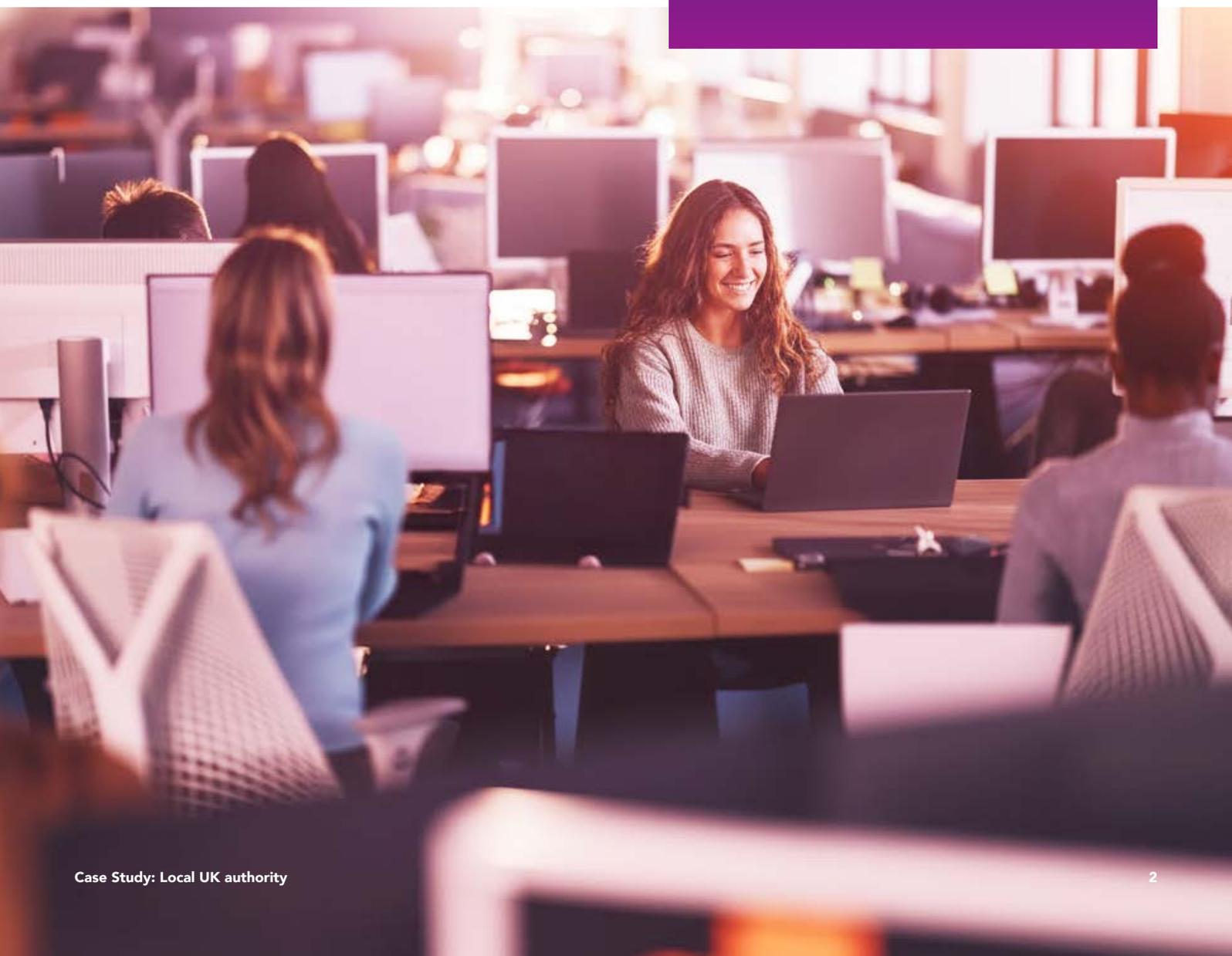
Organisation profile

Sector: Local Government

Challenge: Legacy EDRM system nearing end of life

Solution: Microsoft 365 + FileSmart

Provider: OASIS Information Secured

The challenge

The authority faced several critical challenges
with its existing EDRM system

Technical obsolescence

The legacy system was approaching end-of-support, creating security & compliance risks

Limited accessibility

On-premises infrastructure restricted remote working capabilities

High maintenance costs

Ageing hardware and software required significant ongoing investment

Poor user experience

Outdated interface and workflows hindered staff productivity

Compliance concerns

Difficulty meeting evolving information governance requirements

Integration limitations

Inadequate connectivity with modern digital services

Solution overview

The authority partnered with OASIS to implement a comprehensive cloud-based EDRM solution combining:

Microsoft 365

Providing the foundational collaboration and document management platform with native security, compliance, and accessibility features built in.

FileSmart

Delivering specialist records management capabilities, including automated retention scheduling, disposal workflows, and local government-specific classification schemes aligned to the Local Government Association (LGA) model.

Implementation approach

The project followed a structured, phased methodology to ensure a smooth transition and deliver value at each stage:

1

Discovery & planning

Comprehensive assessment of existing records, workflows, and user requirements

2

Design

Configuration of Microsoft 365 and FileSmart to meet specific local authority needs

3

Data migration

Comprehensive assessment of existing records, workflows, and user requirements

4

Training & change management

Comprehensive assessment of existing records, workflows, and user requirements

5

Go-live & support

Phased rollout with dedicated technical support

Key benefits achieved

By moving to Microsoft 365 and FileSmart, the authority realised several significant organisational gains.

Operational efficiency

- Staff can access records anytime, anywhere via cloud-based access
- Improved search and retrieval times reducing administrative burden
- Automated workflows replacing manual processes

Improved user experience

- Familiar Microsoft interface requiring minimal training
- Seamless integration with Outlook, Teams, and other productivity tools
- Mobile access supporting flexible working arrangements

Cost reduction

- Eliminated on-premises infrastructure maintenance and refresh costs
- Reduced software licensing complexity through consolidated Microsoft estate
- Lower IT support requirements with cloud-managed services

Future-ready platform

- Foundation for broader digital transformation initiatives
- Scalable architecture supporting organisational growth
- Regular updates and new features without capital investment

Enhanced security and compliance

- Advanced threat protection and data loss prevention built into Microsoft 365
- Automated retention and disposal aligned to retention schedules
- Comprehensive audit trails for all record activities
- GDPR and Freedom of Information compliance tools embedded
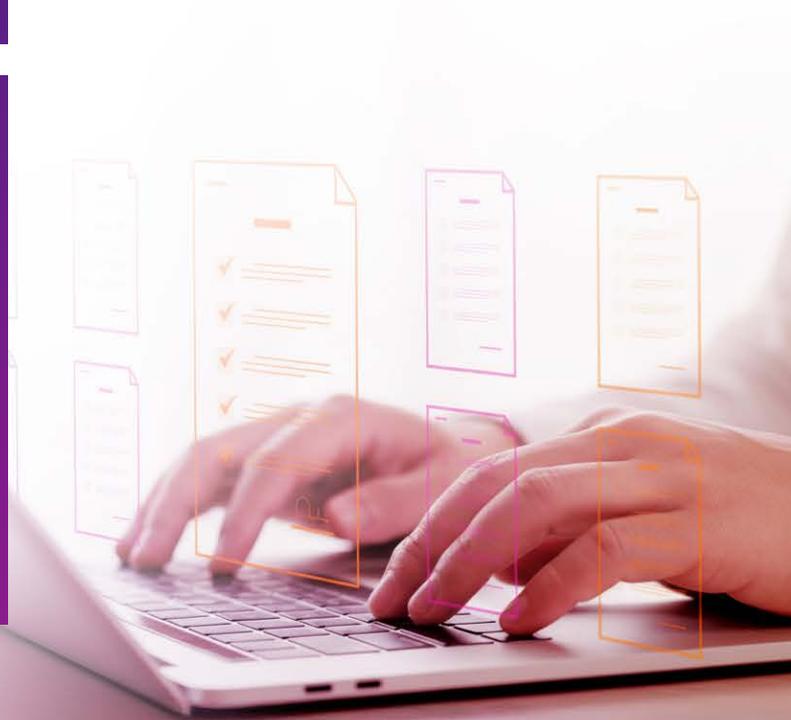
Lessons learned

The authority partnered with OASIS to implement a comprehensive cloud-based EDRM solution combining:

Critical success factors

- Strong executive sponsorship and clear project governance

- Comprehensive stakeholder engagement across departments

- Adequate time allocated for data cleansing and migration

- Ongoing training and user support beyond initial implementation

Recommendations for similar organisations:

- Begin with thorough assessment of existing information assets

- Involve information governance and IT teams from project outset

- Plan for culture change, not just technology change

- Consider hybrid approach during transition period

Conclusion

This local authority's successful transition from legacy EDRM to a cloud-based Microsoft 365 and FileSmart solution demonstrates that modernisation is both achievable and beneficial for councils of all sizes.

The project delivered immediate operational improvements while establishing a flexible, secure foundation for continued digital transformation.

For councils evaluating EDRM solutions, this case study illustrates that with proper planning, stakeholder engagement, and the right technology partners, legacy system replacement can be accomplished with minimal disruption and maximum benefit.

Find out how we can help

Explore how our document management experts can support your authority in modernising records management confidently, securely, and at your own pace.

Let's talk