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End-to-end digitisation with Microsoft 365

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**'s 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.

Our process

Solution Design
Microsoft 365 aligned, tailored to all departments

Filer Deployment
Configured for your policies, classifications and workflows

Validation Testing
Agile improvements, change management and adoption

Indexing & OCR
Optimised OCR, classification and metadata captured

Preparation & Scanning
Industry leading scanners, multiple centres & geographies

Packing & Collection
Boxes, labels, security ties and manifest templates

Send to Filer
Documents routed direct from scanners to Filer

Secure Physical Destruction
Compliant with industry standards, ISO 27001 & BS10008

Scale & Optimise
One single Microsoft platform, all departments, all workflows

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.

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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.

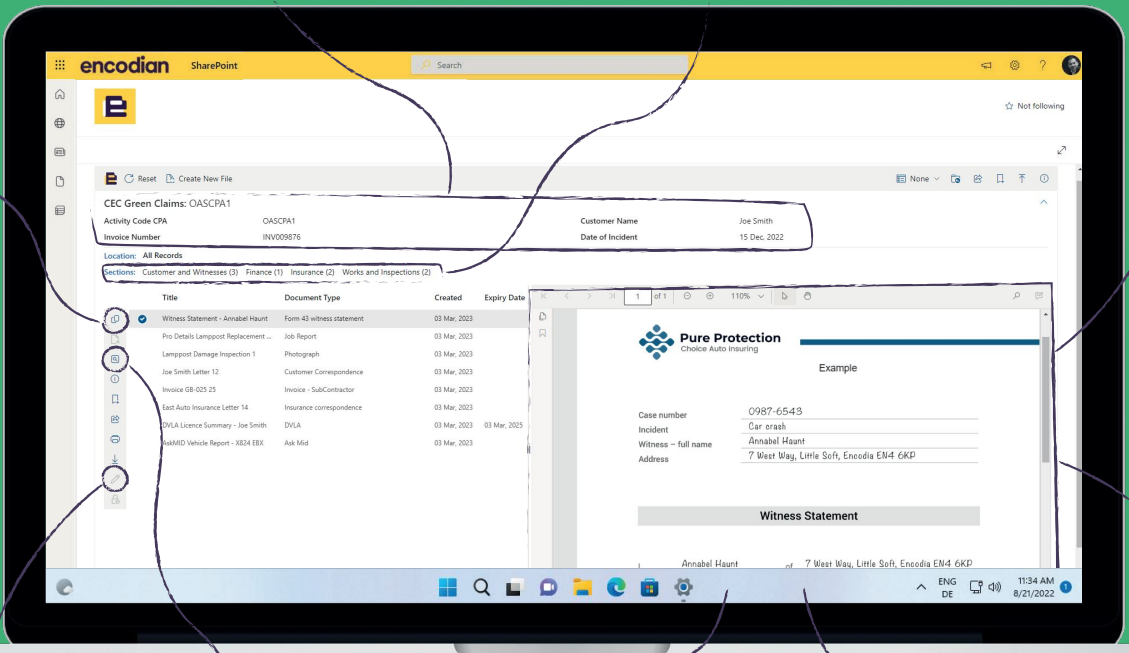| SharePoint	SharePoint + Filer
✕ Clunky viewing experience	✓ Single view and instant document access
✕ Content sprawl and duplication	✓ Organised classification structure
✕ Missing metadata	✓ Automated metadata capture
✕ Misfiled documents	✓ Automated document filing
✕ Limited personalisation	✓ Bookmarks, predefined and contextual views
✕ Limited **Outlook** integration	✓ **Outlook App** for email/attachment filing
✕ Bespoke third-party integrations	✓ Low-code or native third-party interfaces
✕ Complex implementations	✓ OOTB standardised implementation
✕ Difficult to replicate across departments	✓ Easily scalable through configuration
✕ Costly to build and maintain	✓ Inclusive support and updates
✕ Minimal support for scanned documents	✓ Direct ingestion of scanned documents
✕ Minimal PDF format support	✓ PDF conversion and manipulation
✕ Manual annotation and redaction	✓ Annotations and redaction for PDFs
✕ Limited **Power Automate** integration	✓ Enhanced integration via **encodian Trigr**
! Automated retention and disposition (only available with E5 licencing plans)	✓ 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**.

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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.)

View & edit metadata

Unique demographic data

Configurable case sections & breadcrumb

Pan, zoom, & page thumbnails

Edit any document supported by **SharePoint**

Advanced refinement search
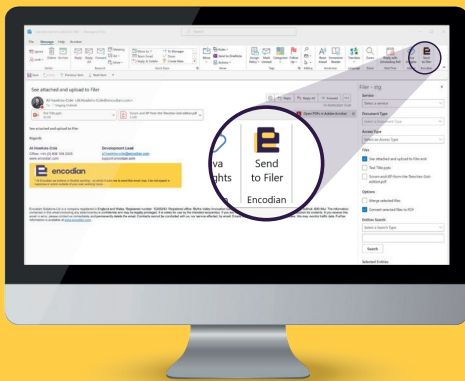
Annotation & redaction

Document viewer

OCR Search

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

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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.
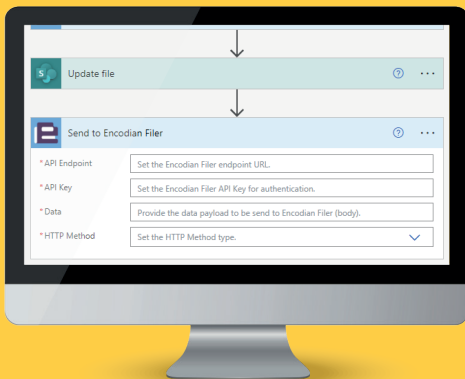
Low-code integration

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.

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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 govenments 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!

Our other Products

Flowr
Our Power Automate Connector

Trigr
One flow for multiple SharePoint sites

Vertr
Convert SharePoint documents

Indxr
OCR your PDF documents

Our Services

Support Services
Microsoft 365 Support
Application Support
Manacged Power Platform Support
SharePoint Support

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

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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.