

Elantis Solutions Inc.

Canadian municipality transforms document & records management with Microsoft 365



Client Profile

A progressive Canadian municipality was reliant on OpenText eDOCS as their electronic document and records management system (EDRMS), but this outdated system did not provide a modern user experience, making it difficult for staff to find information and time consuming to manage the document lifecycle. The platform was cumbersome to use and was increasingly expensive to license and maintain.

Seeking to migrate to Microsoft 365 and modernize their document management approach, the municipality turned to Elantis Solutions.

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The Challenge

The municipality had over 5 million files stored in OpenText eDocs. While the organization largely embraced the idea of moving to Microsoft as a modern and secure solution, the volume of files and the dependence on the current EDRMS for business-critical information posed a challenge.

In addition to concerns about the impact to users and business processes, eDOCS and SharePoint have significant structural differences, making a migration between these two platforms inherently complex. As a public service body, the municipality had a very low risk tolerance for potential data loss, exposure of sensitive information, and non-compliance with regulations for data retention and disposition.

Undeterred, the municipality was keen to align their EDRMS with strategic goals to create an empowered workforce and create a transparent source of information.

Careful planning was needed so that data integrity was maintained, and users could readily adopt new document and records management processes.

The Solution

Elantis provided a comprehensive, phased approach to modernize the municipality's EDRMS solution with a transition to SharePoint Online and Microsoft Purview. This included:

- **Discovery and content analysis:** Elantis conducted a detailed assessment to create a strategy and roadmap for the cloud migration.
- **Proof of concept:** A pilot project demonstrated that SharePoint Online and Purview would meet the municipality's needs and gave the team a hands-on understanding of document and records management capabilities in Microsoft 365.
- **Migration execution:** Elantis executed the migration to SharePoint Online using proven tools, including third-party apps and proprietary scripts. The migration was executed in waves, grouping departments together based on their priority and readiness for change.
- **Records management implementation:** To ensure security and compliance, Elantis configured Microsoft Purview to manage the classification, retention, and disposition of records.
- **Change management:** Knowledge transfer and training was provided to the municipality throughout the entire transition to Microsoft 365.

“Elantis provided a flexible and adaptable solution tailored to our unique needs. Their expertise in SharePoint Online and Microsoft Purview has significantly improved our document management processes, positioning us well for the future.”



The Results

The migration to SharePoint Online and Microsoft Purview transformed the municipality's document and records management capabilities.

The project delivered:

- **Reduced IT expenses:** The solution leveraged Microsoft 365 licensing that the municipality already had, and transitioned away from costly on premise infrastructure.
- **Modern user experience:** Municipality users have a modern user experience on an industry standard platform, thus improving user satisfaction and employee engagement.
- **A single source of truth:** SharePoint Online provided a reliable repository for all documents and enabled in-place records management, making it easier for users to find the information they need to do their jobs.
- **Effective records lifecycle management:** Purview provided better control over temporary records, long-term accessibility for enduring records, and ensured that records can be used as documentary evidence if needed.
- **Efficient email and digitized records management:** The solution extended past documents, to enhance secure handling of emails, scans, images, and other digital resources.
- **Increased access and privacy management:** Purview enhanced access controls and privacy protections.
- **Enterprise application integration:** As an industry-standard platform, Microsoft enabled integration with third-party systems, streamlining processes across the organization.
- **Enhanced workflow and interoperability:** The streamlined document and records processes helped smooth departmental interactions and breakdown silos.

Is your organization struggling with an outdated document and records management system? Let Elantis guide you to a secure, modern digital environment. Contact us today to start your journey Microsoft 365 document and records management.