

Filer

SharePoint-based EDRMS

G-Cloud 15 Service
Definition Document

mizorix



**Document Management, Automation & AI
with Microsoft 365**

Service Definition Document

Service Overview

Filer is an enterprise-grade Electronic Document and Records Management Solution (EDRMS) developed on Microsoft 365, offering native integration with Dynamics 365. It augments SharePoint Online and Dynamics 365 by providing structured, compliant, and intuitive document and records management functionalities, enabling organisations to optimise their existing Microsoft investments. Filer delivers a unified view of customer data, synchronising experiences across Dynamics and SharePoint to ensure scalability and precise permission mapping. This approach addresses security considerations and allows users to manage tasks efficiently within a consolidated application workflow. Additionally, Filer supports metadata-driven filing, retention and disposition processes, automation, governance, and seamless integration with core business applications.

Service Scope and Features

Filer includes:

- Configurable case views and structured document presentation
- Automated metadata capture and document filing
- Records management with retention, disposal and audit trails
- Built-in PDF viewer, annotation and redaction
- Powerful search and refinement
- Integrations with Power Platform, Dynamics 365 and other systems
- Outlook add-in and document uploader
- Role-based access control and granular permissions

Outside scope:

- Customer-specific custom development (available via professional services)
- Migration projects (available via professional services)
- Non-Microsoft platform integrations (available via professional services)



Technical Architecture Summary

Filer is deployed entirely within the customer's own Microsoft 365 tenant.

Core components run within Azure App Services, Azure SQL and SharePoint Online, governed by the customer's existing security, compliance and access controls.

Authentication uses Microsoft Entra ID (Azure AD) including MFA, SSO and conditional access. High-level architecture diagrams are available on request.

Further details available here: [Mizorix - Knowledge Base](#)

Onboarding Process

Onboarding includes:

- Discovery and configuration workshops
- Installation and configuration of Filer components
- Setup of metadata structures, document types and retention policies
- Administrator and user training
- Access to documentation, knowledge base and user guides

Offboarding / Exit

All documents, metadata and records remain stored within the customer's own SharePoint Online tenant. At contract end, only the Filer components are removed.

No data extraction from Mizorix is required.

Optional exit support can be provided on request.

Pricing Model

Licensing pricing is fixed and guaranteed as per the G-Cloud 15 listing.

Mizorix may offer adjusted or optimised pricing in certain scenarios, often to provide a best-and-final offer that reflects usage profile, organisational scale and ROI.

Professional services (implementation, migration, configuration, training) are scoped separately and charged using the day rates published on G-Cloud 15.

Reference: **Filer – Pricing Document G-Cloud 15**

Support and Service Levels

Support is available via a dedicated portal, email, and phone. Standard support comes with Filer licensing, with extended hours as an optional extra.

Further details are provided in the G-Cloud 15 listing and Terms and Conditions document.

Security and Compliance

- Operates entirely within the customer's Microsoft 365 tenant
- ISO 27001-aligned ISMS processes
- Authentication via Microsoft Entra ID (MFA, SSO, conditional access)
- Data encrypted at rest and in transit using Microsoft's controls
- No customer data leaves the tenant
- Filer components updated with secure deployment processes

Roles and Responsibilities

Mizorix responsibilities:

- Installation, configuration and support of Filer
- Product updates and patches
- Documentation and training
- Assistance with governance and configuration

Customer responsibilities:

- Management of their Microsoft 365 environment
- User access control (via Entra ID)
- Approval of configuration decisions
- Any internal processes, data governance or migration activities

Have Additional Questions?

Please contact hello@mizorix.com