



Webinar – 10th March 2026

The AI-Powered EDMS

Electronic Document Management Systems

Transforming How Organizations Manage, Store & Retrieve Documents



More: <https://sibasi.academy>

Housekeeping



Recording

This session will be recorded and once our marketing team has worked their magic, it'll be sent to your inboxes within 6 business days.



Q&A

Ask questions throughout the presentation using the Q&A feature within Teams.

Webinar Agenda

- 01 What is EDMS?**
Core concepts and why it matters
- 02 Classification of EDMS**
From basic storage to intelligent automation
- 03 Key Features & Benefits**
What a modern EDMS delivers
- 04 Sibasi SharePoint EDMS**
How Sibasi builds your solution
- 05 Live Demo**
See our SharePoint EDMS in action
- 06 Q&A**
Your questions answered



Go Paperless.
Go Digital.
Go Smart.

Human labor is reaching its limits

Capacity Gap

80%

of global
workers agreed
they lacked
enough time/
energy to do
their work

53%

of leaders
agreed
productivity
must increase

What to expect in 2026 in Tech Sector



Copilot

Every employee
has a Copilot




Agents

Every organization
process transformed by
agents

Evolving organizational automations with AI

Before 2023

Knowledge workers



2023–2025

Knowledge workers + Copilot



2026

Knowledge workers with Copilot managing Agents





Copilot is a **force multiplier**.
AI does a lot of the heavy
lifting so the people we help
don't fall between the cracks

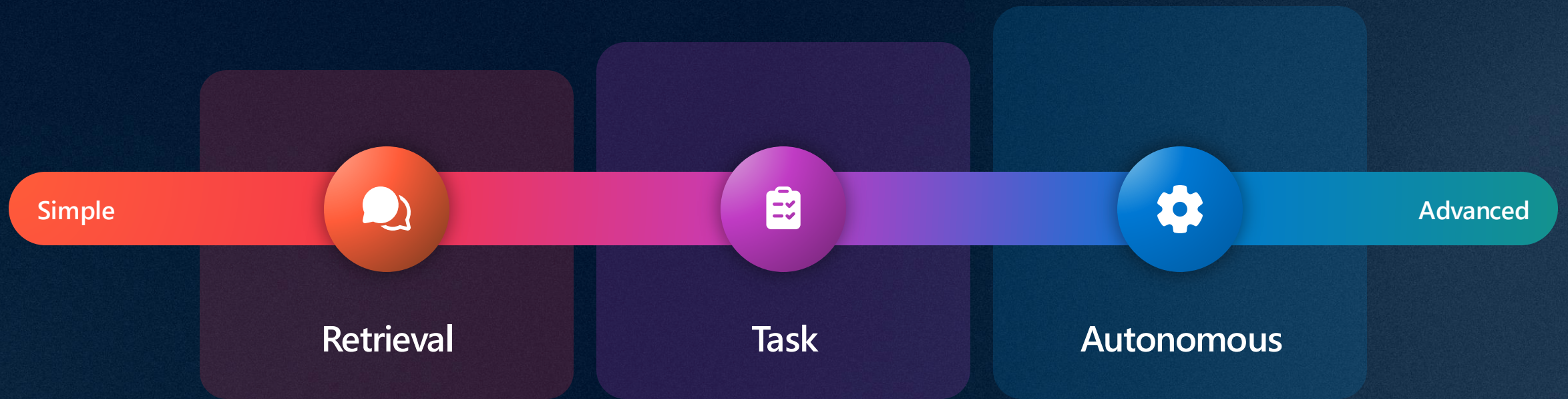
Joel Ramjohn

President, Agape Source



What are agents?

Agents use AI to automate and execute business processes, working alongside or on behalf of a person, team or organization



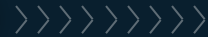
← Agents vary complexity and capabilities depending on your need →

Example

Autonomous

HOW IT WORKS

1 - Trigger



2 - Instructions



3 - Plan



4 - Outcome

Agent automatically reacts to triggers








When a new email arrives
Office 365 Outlook



Agent follows your instructions

- You are an agent that helps to evaluate and staff incoming engagement requests from clients.
- First, analyze the incoming email to extract key client details. Verify the engagement information and confirm the industry sector. Assess historical data and identify the required expertise. Assign a suitable partner and notify them. Log the engagement details and inform the engagement director.

Agent completes the ask using your data and knowledge

-  Engagement staffing logic
-  Submit engagement
-  Send an email
-  Retrieve partner
-  Message in Copilot



Agent generates a response



Agent

You have been assigned to a new engagement requiring your expertise in Technology Solutions.



The problems agents address will continue to expand

User-led

Unlock innovation at every level, department & function

Apply new technology to existing problems to optimize

Fast and iterative

Today

Apply existing technology to an **existing problem** to optimize existing processes

Org-led

Create business-changing agents

Apply new technology to new opportunities

Top-down approach



Core Areas

for a *Frontier Firm* in this era



Deliver more effectively

Improve field visibility, streamline workflows, and use data to maximize impact across diverse and often distributed teams



Better Stakeholder Engagement

Connect with your stakeholders and meet expectations, improve field visibility, streamline workflows, and use data to maximize impact and achievement of your goals

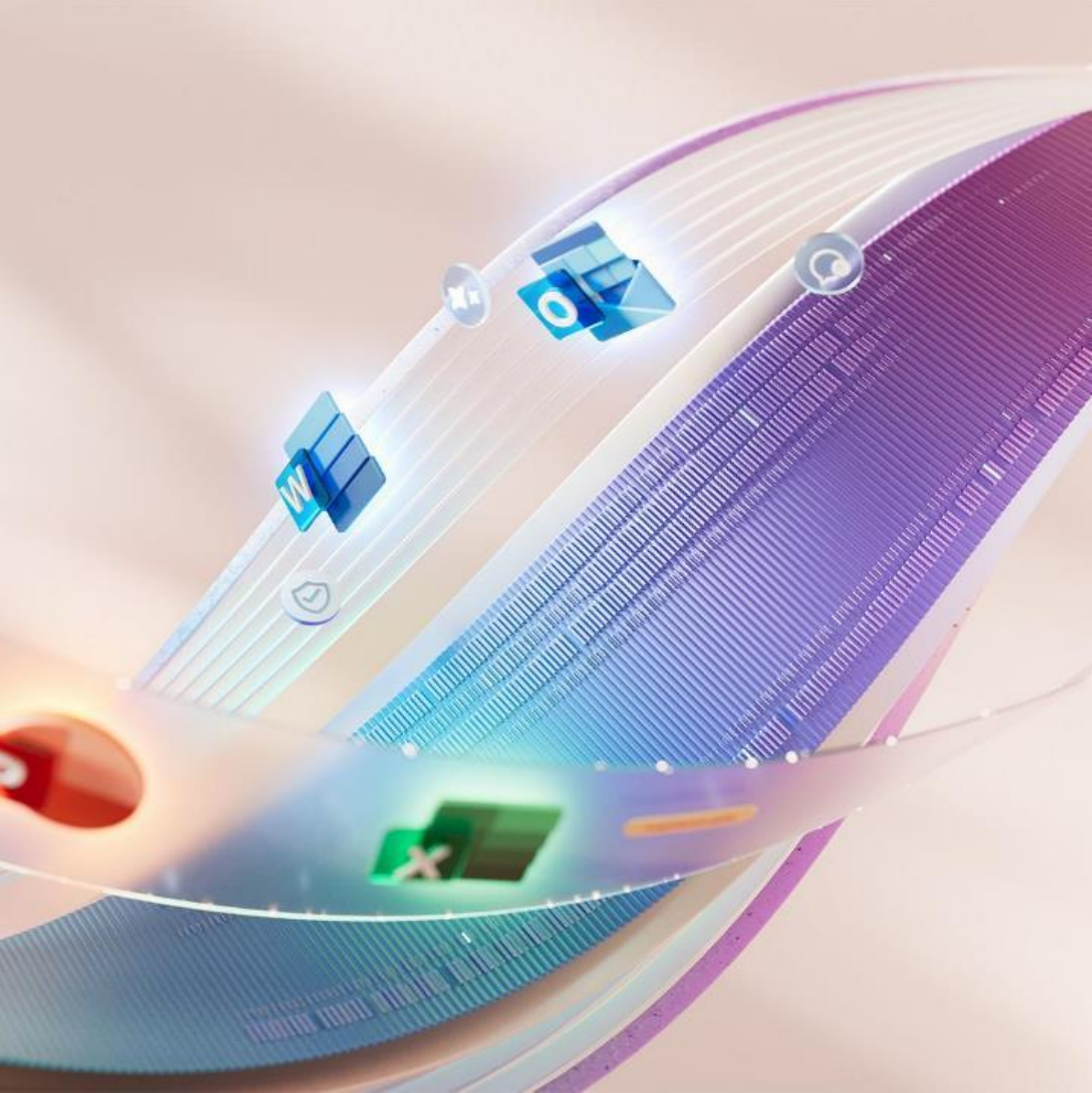


Operational Efficiency & Security

Strengthen internal systems with secure, modern, and cost-effective tools that support compliance and resilience despite infrastructure constraints

EDMS

Enterprise Document Management System



What is an EDMS?



An Electronic Document Management System (EDMS) is a software solution that enables organizations to create, store, manage, track, and retrieve electronic documents and images of paper-based information captured through scanning.



Centralized Storage

Single source of truth for all organizational documents



Rapid Retrieval

Find any document in seconds with metadata search



Security & Compliance

Role-based access, audit trails, and retention policies



Process Automation

Automate approvals, reviews, and document workflows

Organizations struggle to find the time, innovation, and data to grow



71%

lack energy to get day-to-day work done, and more than half need more focus time



67%

struggle with being innovative or thinking strategically



61%

believe they spend too much time searching for the right data or information when they need it

This is our moment...

Lead through tech transformation when you empower your organization to



Drive growth



Manage costs



Deliver value



A forward-thinking solution to

Provide the best customer experiences by driving high internal efficiencies through automation with the best technology that is future ready



Capture & Classify

Upload from various sources
Naming & categorization



Secure storage

User access control
AI readiness



Workflows Automation



Search, Retrieval & Audit Trails



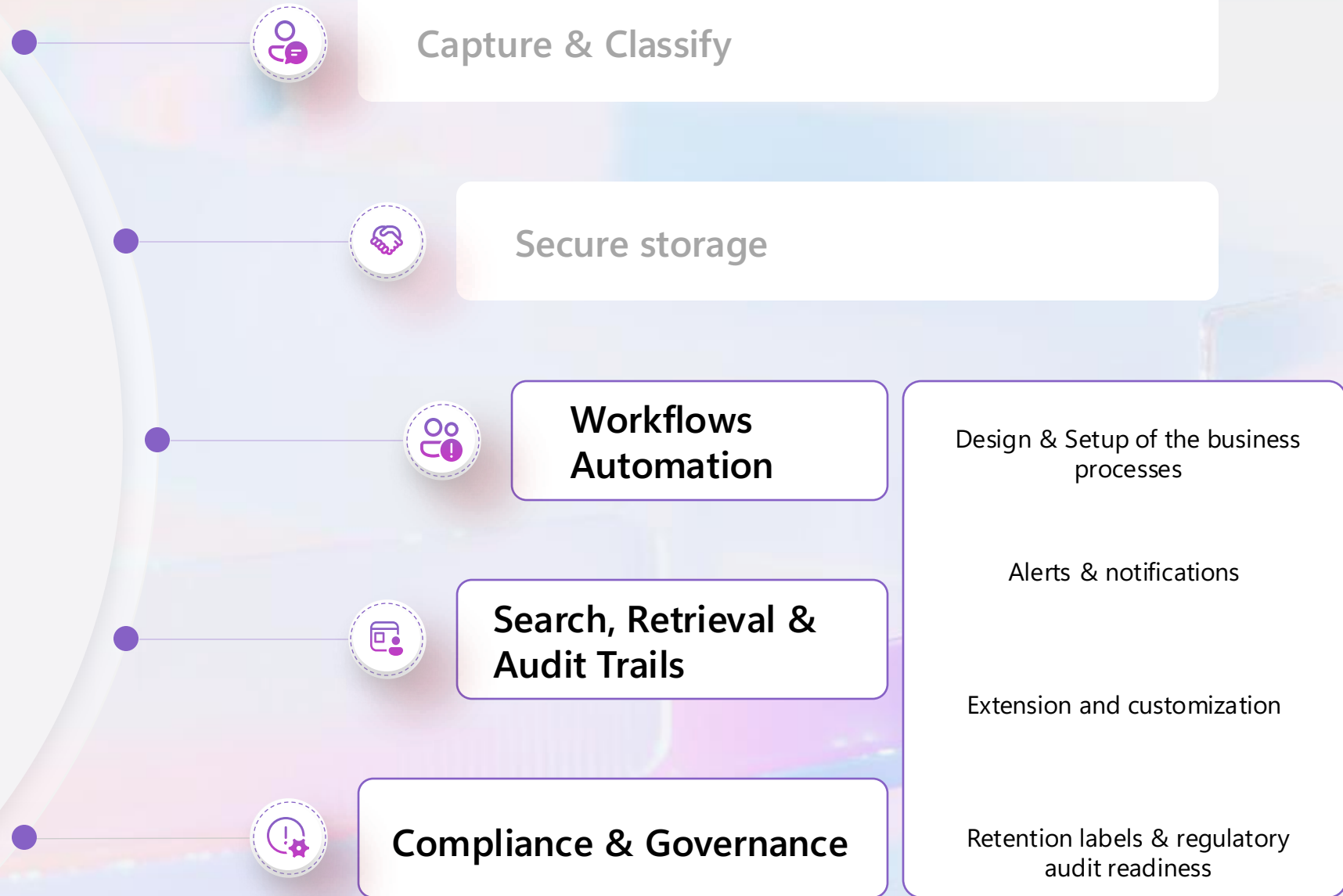
Compliance & Governance





Deployment of the solution enables faster better services

Extend attach services from deployment, to adoption, and beyond to have an enabled workforce of the future



Microsoft powered EDMS

Maximize your team productivity in the flow of work

EDMS available on all your devices

Ask questions and receive relevant answers from across the document management system, and other knowledge sources

Surface knowledge directly in Teams and Outlook

Work efficiently using the tools you are familiar with

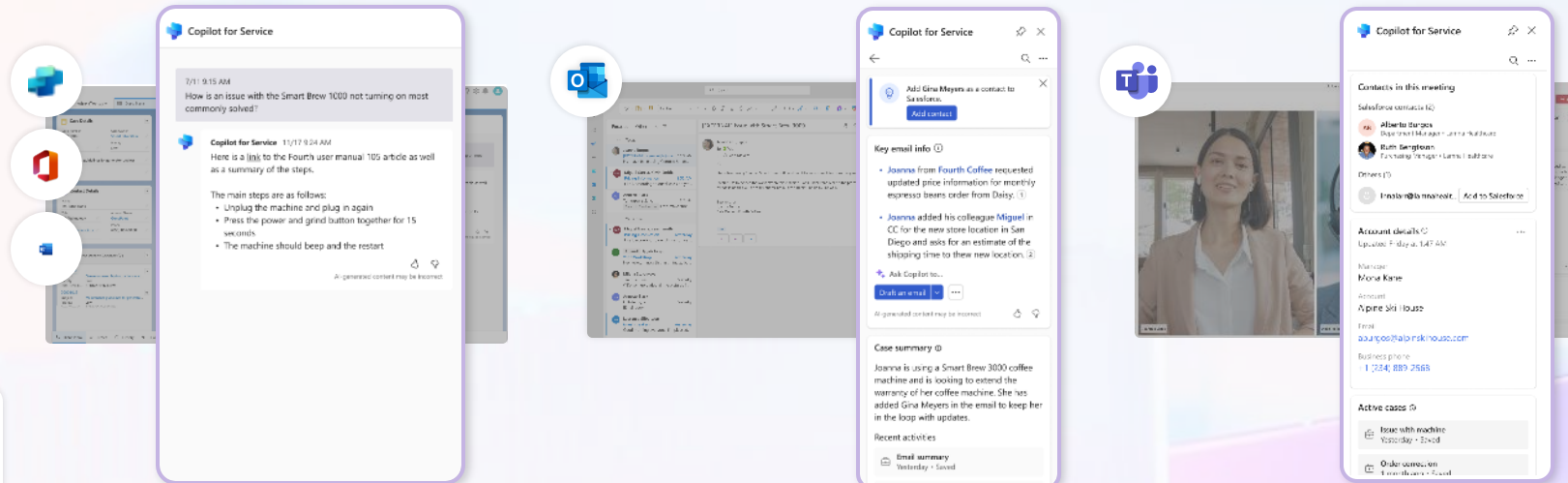
Collaborate on tools you are familiar with

Secured by the right access rights

Browse and update records

Create documents from information stored in your systems

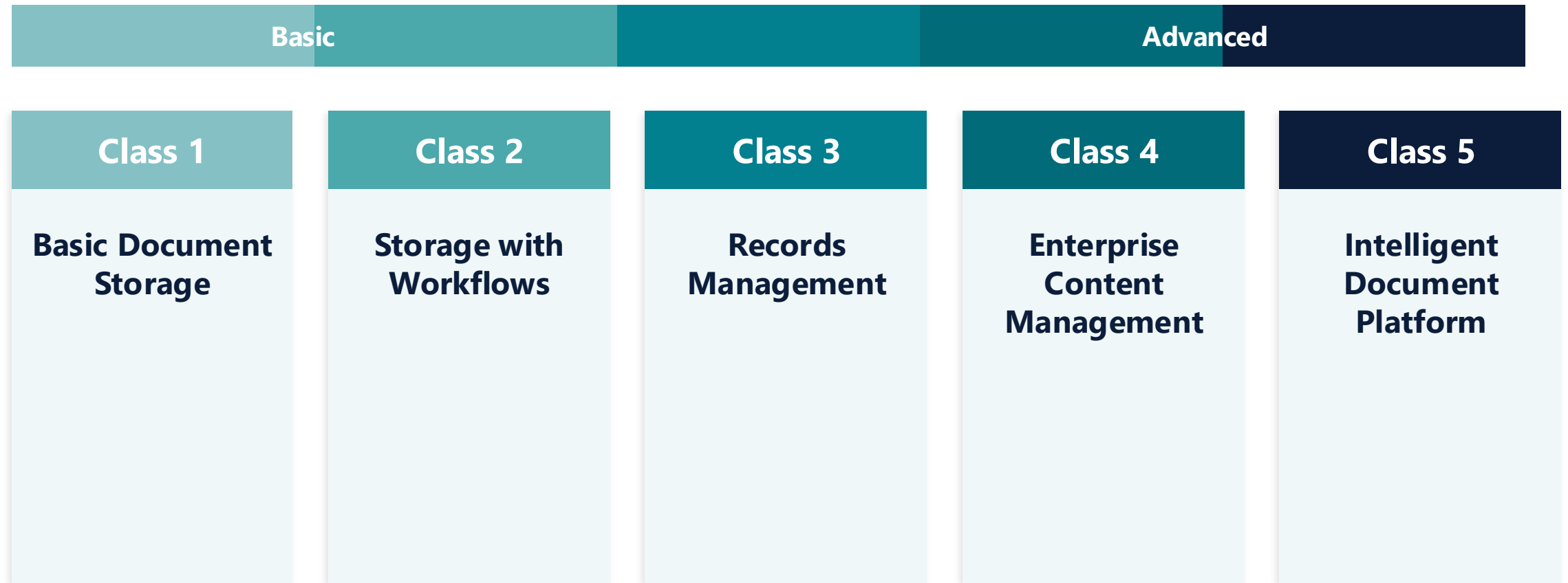
Integrate with existing or any future systems



Classification of EDMS



EDMS solutions span a maturity spectrum from simple file storage to intelligent, AI-driven platforms.



Simple cloud or on-premise file repositories that replace physical filing cabinets and shared network drives.

- ✓ Centralized file storage with folder structures
- ✓ Basic search by file name and date
- ✓ Simple permission controls (read/write)
- ✓ File check-in / check-out
- ✓ Version history (basic)
- ✓ Cloud or on-premises deployment



Examples

Google Drive

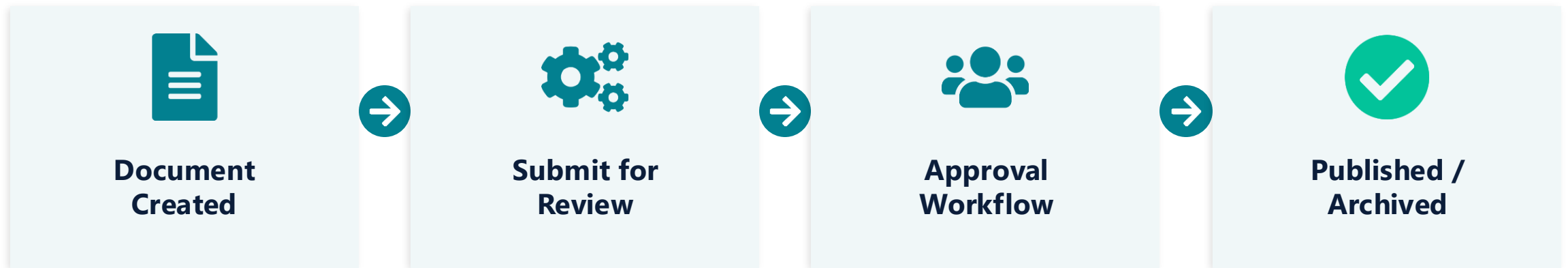
Dropbox

OneDrive (basic)

Simple SharePoint
Document Libraries

Document Storage with Workflows

Extends basic storage with automated approval processes, routing, notifications, and document lifecycle management.



- ✓ Automated approval workflows (serial & parallel)
- ✓ Email notifications and reminders
- ✓ Document status tracking (Draft, In Review, Approved)
- ✓ Audit trail for compliance

Formal records management with retention schedules, legal holds, regulatory compliance, and disposition policies.



Governance & Compliance

- ✓ Retention schedules & disposition
- ✓ Legal hold capabilities
- ✓ Compliance with ISO 15489
- ✓ Classification taxonomies



Organization & Tracking

- ✓ Full audit trail & reporting
- ✓ Metadata-driven organization
- ✓ Email archiving integration
- ✓ Physical-digital hybrid tracking

Holistic management of all content types across an organization — documents, web content, digital assets, and collaborative workspaces.



Document Management

Full lifecycle control



Workflow Automation

Complex business processes



Records Management

Compliance & retention



Collaboration Portals

Team sites & intranets



Digital Asset Management

Media, images, video



Analytics & Reporting

Usage & compliance insights

AI-powered document intelligence — auto-classification, content extraction, predictive analytics, and integration with enterprise AI copilots.



AI Auto-Classification

Documents automatically tagged and categorized using machine learning



Intelligent Data Extraction

OCR + AI extracts key data from invoices, contracts, and forms



Predictive Analytics

Surface trends, anomalies, and insights from document repositories



Copilot Integration

Natural language queries across your entire document corpus via Microsoft 365 Copilot

Why SharePoint for EDMS?



Microsoft SharePoint provides the ideal platform — spanning all 5 EDMS classes within a single, scalable ecosystem.



Microsoft 365 Ecosystem

Seamless integration with Teams, Outlook, Word, Excel, and Power Platform



Cloud-Native & Scalable

SharePoint Online on Azure — no infrastructure to manage, scales with your org



Enterprise Security

Built-in DLP, sensitivity labels, conditional access, and compliance certifications



Power Automate Workflows

Drag-and-drop workflow builder for approvals, notifications, and routing



Microsoft Search + AI

Copilot-ready platform with intelligent search across all content



Familiar Interface

Low learning curve — users already know Microsoft 365 tools

Sibasi SharePoint EDMS Solution



User Interface Layer

SharePoint Modern Sites + Teams Integration + Mobile App

Document Management

Libraries | Metadata | Versioning | Co-authoring | Templates

Workflow & Automation

Power Automate | Approvals | Notifications | Business Rules

Security & Compliance

Permissions | DLP | Retention | Audit | Sensitivity Labels

EDMS

Electronic Document Management System



Microsoft 365
Copilot



Microsoft
SharePoint

Sales



HR



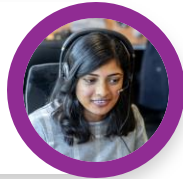
Marketing



Finance



Customer
Service



IT



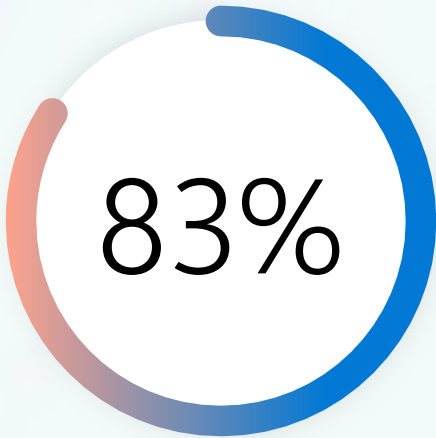
Legal



Industry

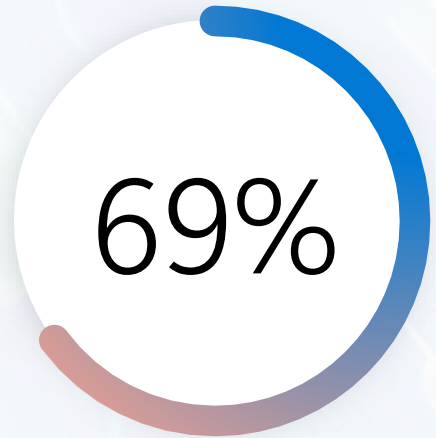


AI is only as good as the data it's grounded on

A circular infographic showing 83%. The circle is mostly blue, with a small red segment on the left side. The percentage '83%' is centered in the white space of the circle.

83%

of senior business leaders said their organization's AI adoption would be faster if they had stronger data infrastructure in place

A circular infographic showing 69%. The circle is mostly blue, with a small red segment on the bottom left side. The percentage '69%' is centered in the white space of the circle.

69%

of top-performing companies have implemented data modernizations

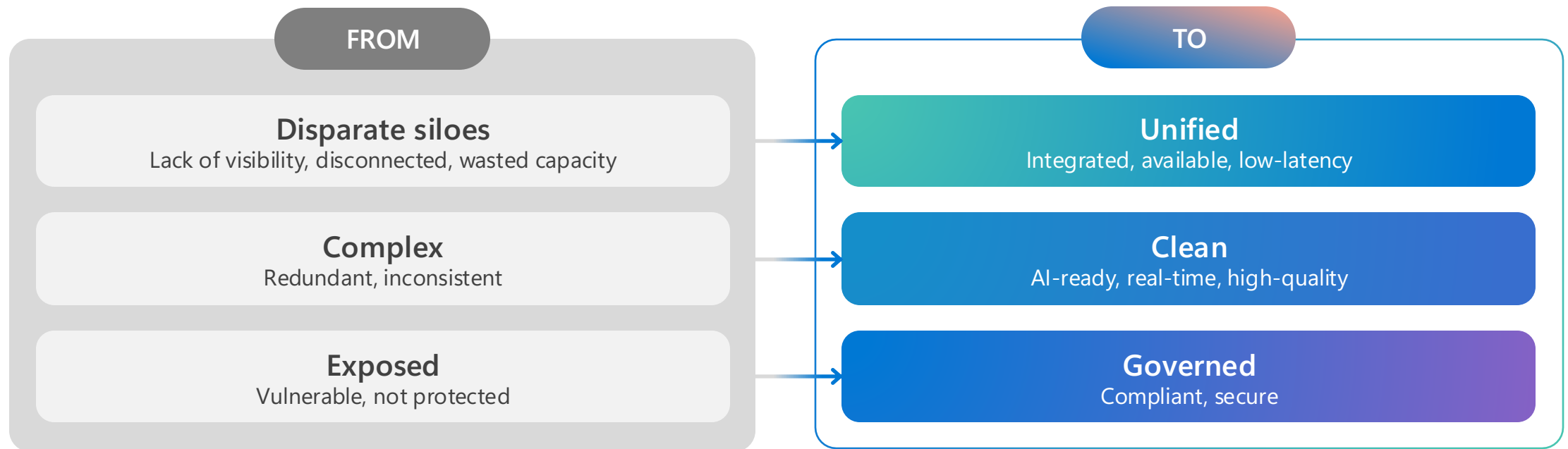
Sources: [Gartner](#), [EY](#)

Unlock AI with unified data

AI is only as good as the data it trains on

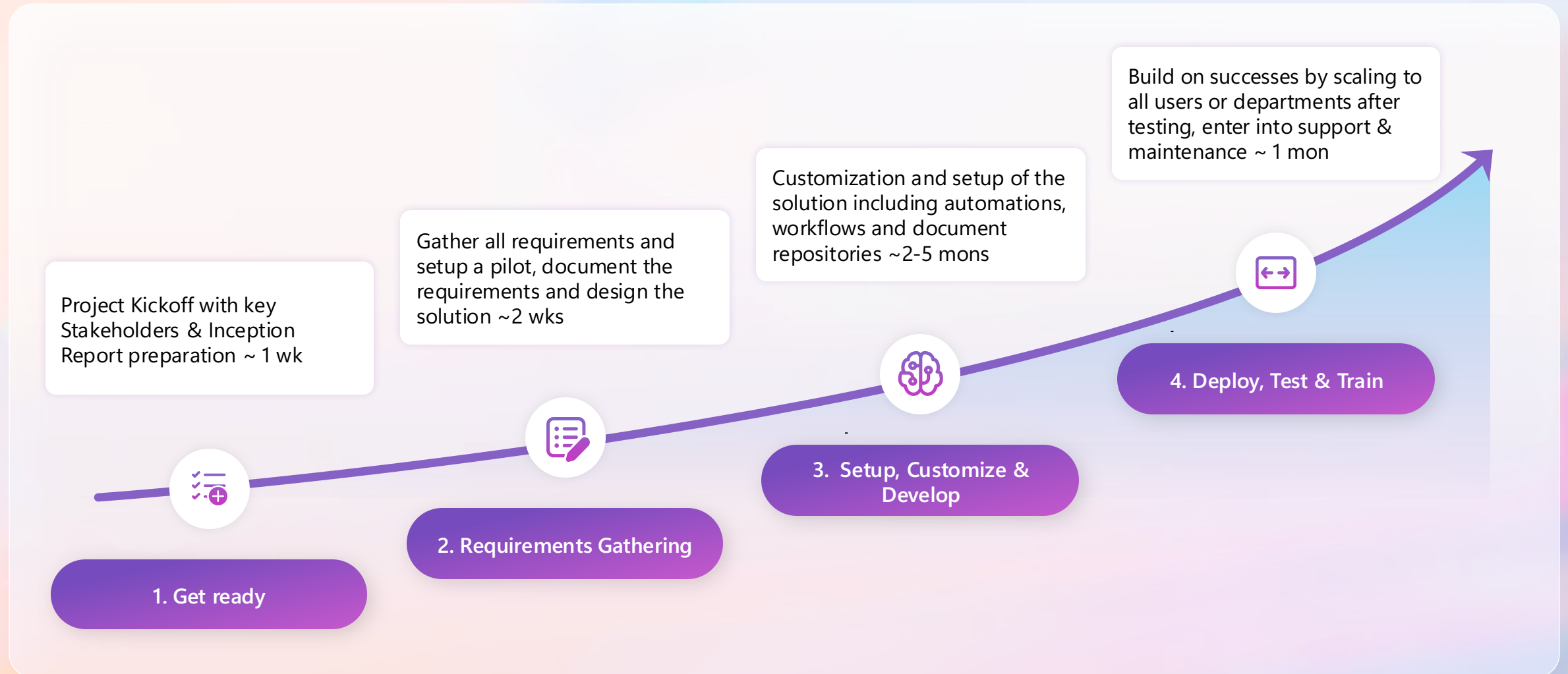
90% believe that unifying data on a single platform is critical for AI

72% agree that data issues are the most likely factor to jeopardize AI goals



1. [Cloudera](#)
2. [Databricks](#)

Four steps to setup your EDMS





Let us help you find the right solution

Business Processes
Automation

The screenshot displays a 'Change summary' for a purchase order. It includes a table with columns: Purchase order, Line number, Line name, Fields, Original value, and New value. The table lists three items: PO123 (Water heater), PO123 (Water heater), and PO123 (Pump). An 'Impact analysis' section shows a 'No stockout predicted within the lead time.' A 'Reference' section contains an email snippet from Erik. A 'Classification needed' dialog box is overlaid on the table, asking for confirmation to update the purchase order.

Board Management
eBoard

The screenshot shows a 'Chat' window with a sidebar listing contacts like Miguel Garcia, Design team, and Marketing. The main chat area displays a 'Time Entry Agent' chat with a message about a new draft entry of 8 hours for a project. Below the chat is a 'Time Entry Agent' summary card showing project details, tasks, and hours.

Memo Management
Smart Memo

The screenshot displays 'Lead insights' for Wanda Jones from Catholic Social Services. It includes a 'Suggested action' to draft an email to engage with Wanda, with bullet points detailing the lead's characteristics (nonprofit, 15-50 employees, \$1,000,000 budget). Below are sections for 'About Wanda Jones' and 'About Catholic Social Services' with an account record.

Report

The screenshot shows a 'Project Operations' report for Jeremy Robbins. It includes a 'Summary' section with 'Submitted' status, 'Approver' (Karin Curtis), and 'Owner' (Karin Curtis). A 'Resource' section lists 'Resource utilization' and 'Billing type' (Chargeable). A 'Pushing' section shows 'Sales price' (\$1000) and 'Material on order' (\$1000).

..... Solutions vary in levels of complexity and capabilities depending on your need

About Us



Who we are

About us

Our Mission

Services. Solutions. Success

Our Services & Solutions

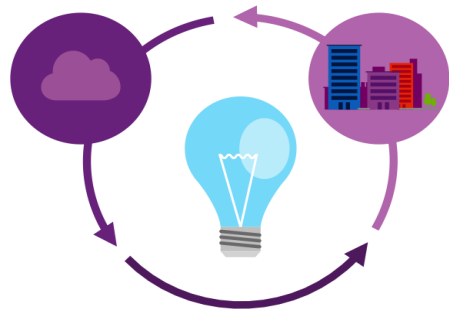
What we can do for you

Partners & Clients

For your success!



We are an
**AI-Native & Innovative
Technology Company**



Passionate about
delivering **Excellence
and Quality**



**With Services and
Solutions** provided at
digital-era **velocity**



empowering you to
achieve measurable
Success & Impact!



Our Mission



Who we are
About us

Our Mission
Services. Solutions. Success!

Our Services & Solutions
What we can do for you

Partners & Clients
For your success!



Our mission... is at the heart of our name



S

Services and
Solutions

I

Invested and
Integrated
into your

B

Business, for
you to

A

Achieve your

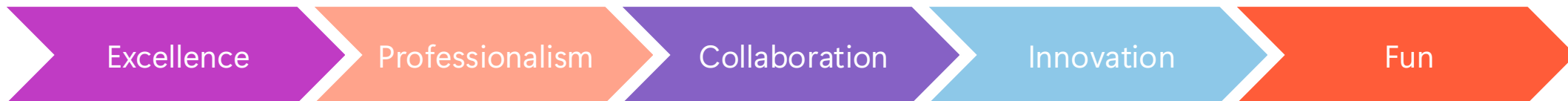
S

Success and

I

Impact.

Our Values:



Our Partners



Who we are
About us

Our Mission
Services. Solutions. Success

Our Services & Solutions
What we can do for you

Clients & Testimonials
For your success!



Sibasi | Gold Microsoft Partner



Microsoft Solutions Partner

<https://siba.si/appsource>

Microsoft Premier Partner

aws Partner

Google Partner

Our Services & Solutions



Powering the AI Digital Age



Intelligent Business Platforms



Board Management



Smart Memo



CRM, ERP, EDMS



M&E and Reporting



Microsoft Digital Transformation



Enterprise Systems



Productivity Systems



Business Process Automation



Robotics & Data Analytics Systems



Advisory, Consulting & Support



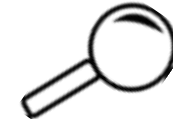
24/7 Support & Managed IT Services



Training Services & Capacity Building



IT Strategy & Roadmap



Security Assessments



Cloud Management



Q&A Thank You

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