



Otagem Tasks

G-Cloud 15 Service Definition Document

January 2026

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1. Introduction

Otagem Tasks is a task management solution built on Microsoft Power Apps and SharePoint, designed to help organisations plan, assign, track, and manage work in a clear and structured way.

Many organisations struggle to maintain visibility of tasks, deadlines, and ownership across teams. Otagem Tasks focuses on simplicity and accountability, providing a consistent way to manage both day-to-day and recurring tasks without adding unnecessary complexity for users.

The solution integrates with Microsoft 365 and can optionally integrate with Intapp Collaboration, allowing tasks to be linked to defined matters where required. The emphasis is on clarity, prioritisation, and providing staff and their managers with timely insight into upcoming and overdue work.

2. Otagem Tasks Functional Definition

Otagem Tasks is designed to make task management straightforward for users while providing managers with clear oversight of workload, deadlines, and progress.

The solution provides an intuitive user interface built using Microsoft Power Apps, allowing users to create, view, and update tasks with minimal effort.

Tasks can be assigned to individuals or groups, include priorities and due dates, and support both one-off and recurring activities. Users can record task completion, including completion notes, ensuring context and auditability are retained.

Managers have access to reporting views that highlight upcoming tasks, overdue items, and workload distribution across teams. Completed tasks can be archived to maintain performance while retaining historical records for reporting and compliance.

2.1. Otagem Tasks – Working with Tasks

The screens below illustrate the simple, structured user interface of Otagem Tasks.

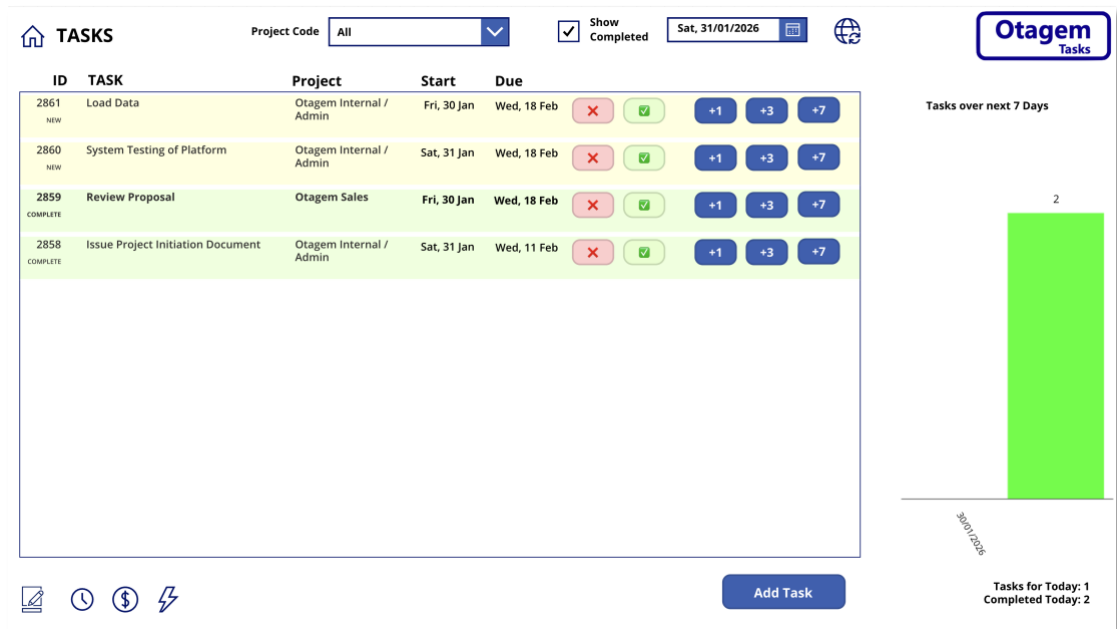


Fig. 1 - Shows assigned tasks, priorities, deadlines, and status indicators

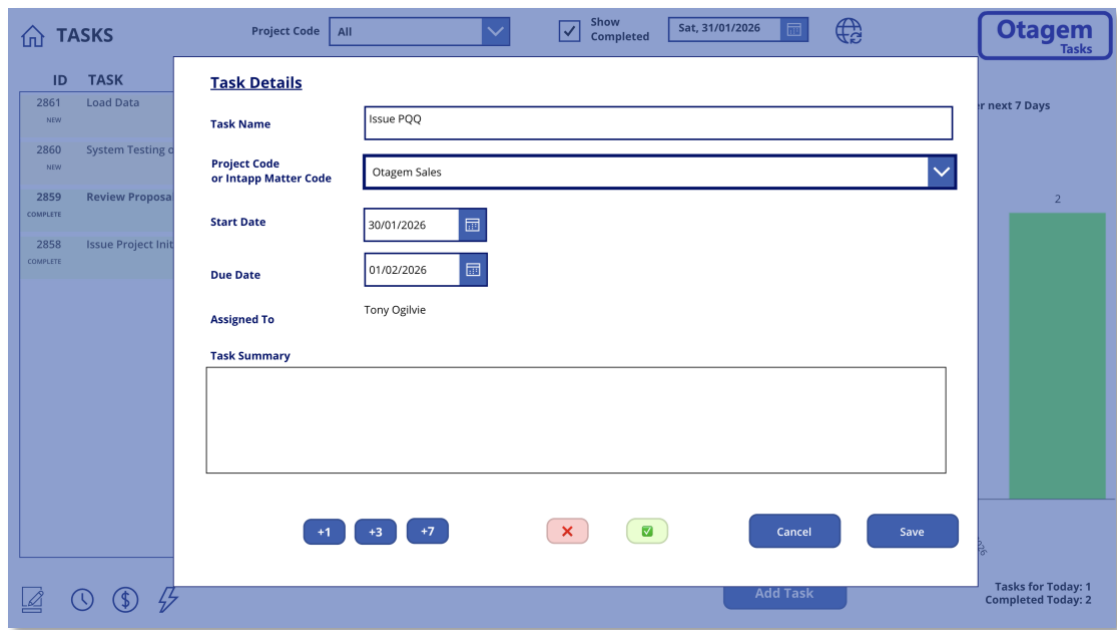


Fig. 2 - Logging Tasks View
showing how easy it is to log tasks, with optional Integration to Intapp Matter Codes

3. Otagem Tasks Services

Otagem Tasks is delivered as a configurable solution deployed within the customer's Microsoft 365 tenant. The service is structured around three closely related areas:

- User Task Management
- Management Insight and Reporting
- Technical Configuration and Integration

Each area supports effective task ownership, visibility of deadlines, and management oversight.

3.1. User Task Management

This area focuses on the experience of users creating, managing, and completing tasks.

The solution is designed to be quick to adopt and easy to use, encouraging consistent task updates and clear ownership.

Standard capabilities include:

- Simple, intuitive Power Apps user interface
- Creation of one-off and recurring tasks
- Assignment of tasks to individuals or groups
- Task priorities and deadline management
- Task reassignment where required
- Recording of task completion with notes
- Management of tasks linked to Intapp Collaboration Matter Codes (optional)
- Archiving of completed tasks

3.2. Management Insight and Reporting

This area focuses on how tasks are reviewed and monitored by managers and business teams.

The aim is to provide clear visibility of workload, upcoming deadlines, and overdue tasks to support operational planning and risk management.

Standard capabilities include:

- Visibility of upcoming and overdue tasks
- Reporting on task status across teams
- Reporting on task status across Intapp Matters (optional)
- Management dashboards for workload oversight
- Identification of bottlenecks and overdue activity
- Integration with Power BI for advanced reporting and trend analysis

3.3. Technical Configuration and Integration

This area covers how Otagem Tasks is configured and integrated within the customer's Microsoft 365 environment.

The solution uses standard Microsoft technologies and aligns with customer governance, security, and information management policies.

Typical capabilities include:

- Deployment within the customer's Microsoft 365 tenant
- SharePoint-based task data storage and archiving
- Power Automate workflows for notifications and reminders
- Integration with Microsoft 365 services
- Optional integration with Intapp Collaboration to link tasks to matters
- Power BI integration for management reporting

4. Supported Technologies

4.1. Primary Platforms

- Microsoft 365
- Intapp Collaboration (Matters List)
- Microsoft Entra ID
- Power Automate
- Power Apps
- Power BI
- Logic Apps

5. Service Delivery Model

The service is delivered primarily remotely, with on-site delivery available by agreement where required.

Otagem Tasks is deployed within the customer's own Microsoft 365 tenant using standard Power Platform and SharePoint components. Engagements typically include configuration, deployment, knowledge transfer, and handover.

Ongoing support is provided by agreement. Enhancements, new features, or changes to functional behaviour are delivered separately.

Otagem operates within customer-defined security, identity, and access management policies. Access is limited to the minimum required to deliver the service, and no customer data is removed from the tenant unless explicitly agreed.

6. Contact Details

For more information on any of our services, please contact Tony Ogilvie via any of the methods below:

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