



Otagem Invoicing

G-Cloud 15 Service Definition Document

January 2026

Table of Contents

- 1. INTRODUCTION 3
- 2. OTAGEM INVOICING FUNCTIONAL DEFINITION 4
 - 2.1. Otagem Invoicing – Working with Invoices 5
- 3. OTAGEM INVOICING SERVICES 6
 - 3.1. Invoice Creation and Approval 6
 - 3.2. Financial Insight and Budget Tracking 7
 - 3.3. Technical Configuration and Integration 8
- 4. SUPPORTED TECHNOLOGIES 9
 - 4.1. Primary Platforms 9
- 5. SERVICE DELIVERY MODEL 10
- 6. CONTACT DETAILS 11

Document Control	
Version	1.0
Document Status	DEFINITIVE
Prepared by	Tony Ogilvie, Otagem Consulting
Document Date	January 2026

Disclaimer: While Otagem Consulting aims to ensure the information contained in this document is as complete and accurate as possible, Otagem Consulting makes no claims, promises, or guarantees about the accuracy, completeness, or adequacy of the contents of this document, and expressly disclaims liability for errors and omissions in the contents of this document.

1. Introduction

Otagem Invoicing is an automated invoicing solution built on Microsoft 365 that generates client-ready invoices directly from approved timesheet data.

Public sector organisations often need a reliable, auditable way to convert recorded time into accurate invoices while maintaining strong financial controls. Otagem Invoicing removes manual re-keying, reduces billing errors, and ensures consistent application of rates, purchase order references, and budgets.

The solution generates draft PDF invoices for internal review and approval before release to clients. It can optionally integrate with matter or project reference data held in external systems such as Intapp Collaboration, allowing invoices to align with existing financial and operational structures.

2. Otagem Invoicing Functional Definition

Otagem Invoicing automates the end-to-end process of invoice generation, from time capture through to approved PDF output.

Timesheet entries are consolidated into invoice lines based on configurable rules such as date range, client, project, Intapp Collaboration Matter or purchase order number. Budgets are tracked automatically against each purchase order, providing early visibility of spend and reducing the risk of overspend.

Invoices are generated as PDFs and routed through an approval process before being issued, ensuring appropriate financial governance and auditability.

2.1. Otagem Invoicing – Working with Invoices

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



Fig. 1 - Shows draft invoices, approval status, purchase order references, budget utilisation, and variance indicators

3. Otagem Invoicing Services

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

- Invoice Creation and Approval
- Financial Insight and Budget Tracking
- Technical Configuration and Integration

Each area supports accurate billing, clear approval controls, and financial visibility.

3.1. Invoice Creation and Approval

This area focuses on the experience of users responsible for preparing, reviewing, and approving invoices.

The solution is designed to minimise manual effort while maintaining strong controls over billing accuracy and approval.

Standard capabilities include:

- Automated creation of invoice drafts from approved timesheet data
- Consolidation of time into invoice lines based on configurable rules
- Application of billing rates and calculations
- Association of invoices with purchase order numbers
- Optional linkage to Intapp Collaboration Matter references
- Generation of draft PDF invoices for internal review
- Configurable approval workflows prior to invoice release
- Secure storage and archiving of issued invoices

3.2. Financial Insight and Budget Tracking

This area focuses on providing visibility of invoicing activity and spend against budgets.

The aim is to support financial control, forecasting, and early identification of budget pressures.

Standard capabilities include:

- Real-time tracking of spend against purchase order budgets
- Visibility of remaining budget and forecast overspend
- Reporting on invoiced and unbilled time
- Reporting by client, project, or purchase order
- Optional reporting aligned to Intapp Matters
- Management dashboards for financial oversight
- Integration with Power BI for advanced reporting and trend analysis

3.3. Technical Configuration and Integration

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

The solution uses standard Microsoft technologies and aligns with customer governance, security, and financial control policies.

Typical capabilities include:

- Deployment within the customer's Microsoft 365 tenant
- SharePoint-based storage of invoice and billing data
- Power Automate workflows for invoice generation and approvals
- PDF generation using Microsoft 365 services
- Integration with Microsoft 365 identity and security controls
- Optional integration with Intapp Collaboration for matter reference data
- Power BI integration for financial and 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 Invoicing is deployed within the customer's own Microsoft 365 tenant using standard Power Platform and SharePoint components. Engagements typically include configuration, deployment, invoice template setup, approval workflow configuration, knowledge transfer, and handover.

Ongoing support is provided by agreement. Enhancements, new features, or changes to billing rules or 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:

Email: Tony.Ogilvie@otagem.com
Telephone: +44 (0)795 270 9175
Web: www.otagem.com

End of Document