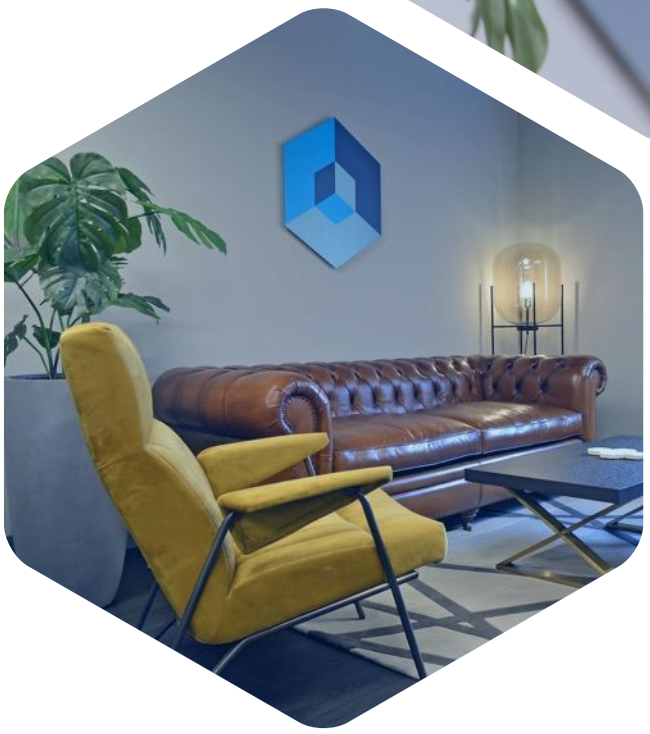
Valto

SharePoint Controlled Documents





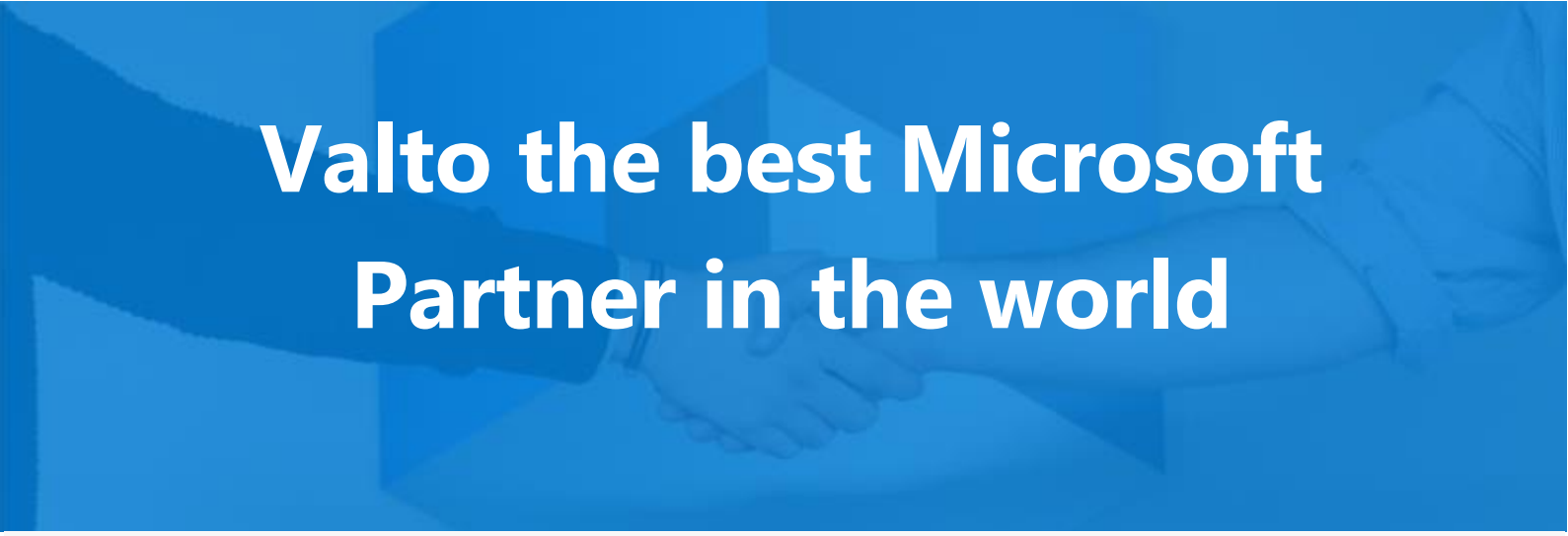






Valto

Valto the best Microsoft Partner in the world



Microsoft 365 | SharePoint | Power Apps | Teams | Azure | Intune | Copilot | Viva

Valto is a Microsoft specialist committed to helping customers get more from Microsoft.

As a Microsoft Solutions Partner, we are experts in Microsoft Technologies including Modern Workplace, Microsoft 365, Azure, Business Applications, Data & AI.

One of our primary goals is to help "Change the World" by Impacting 1 million lives positively through social initiatives and working with non-profits.

Our Vision

- Best place to work
- Biggest and best projects
- Happiest Customers
- Change the World
- Best Culture
- Best Talent

MODERN WORKPLACE

DEVELOPING INTRANET, DOCUMENT MANAGEMENT AND HYBRID WAYS OF WORKING SOLUTIONS USING MICROSOFT TEAMS, SHAREPOINT, VIVA, AND OTHER MICROSOFT 365 SERVICES

MICROSOFT 365 & AZURE

ASSISTING ORGANISATIONS MANAGING DEVICES INCLUDING DESKTOPS / MOBILES AND MIGRATING TRADITIONAL SERVERS INFRASTRUCTURE TO THE AZURE PUBLIC CLOUD

BUSINESS APPLICATIONS

PROVIDING DEVELOPMENT SOLUTIONS AROUND THE MICROSOFT POWER PLATFORM INCLUDING POWER APPS, POWER BI AND POWER AUTOMATE

DATA & AI

PROVIDING AI SOLUTIONS INCLUDING FABRIC, POWER BI, AZURE PRO CODE DEVELOPMENT AND COPILOT

MANAGED SERVICES

PROVIDING MANAGED SERVICES FOR ALL THE PILLARS OUTLINED INCLUDING IT SUPPORT FOR ORGANISATIONS.

Introduction

Our controlled documents system is designed to help organisations who need to store controlled documents with a regular review process and tracking of reading them. Typically this system is used for the following:

- Policies, Procedures & Forms
- Accreditations examples including:
    - ISO
    - BRC
    - Cyber Essentials

The system is fixed in the way that it works unless tokens are used to customise this and provide change requests.

Controlled Documents with Microsoft 365 - In this short video we will demonstrate one of our pre-built controlled documents management systems built within SharePoint Online and using Power Automate for workflow processes.

Discover how the tools in Microsoft 365 can provide an auditable and automated ISO document management system. **https://valto.co.uk/microsoft-sharepoint/iso-management/**

This system contains the following features:

- **Homepage:** To easily display your controlled documents.
- **Review Date**: Prompt your document owners to review documents every 3, 6, 12, 24 or 36 months.
- **Approval**: Once reviewed your documents will require sign off and approval by an named person or group.
- **Version Control**: Our system provides both major (1, 2, 3) and minor (0.1, 0.2, 0.3) version control. Ensuring document owners only see minor versions and everyone else sees the latest published version.
- **Automated Emails**: All actions required issue emails with links to the document. Actions can then be completed by buttons within emails, making the process quick and efficient.
- **Audit History**: A full audit trail of who, what, when changes have been made to every document.
- **Tracker**: Once a document is approved, automate emails to specific groups of employees to digitally capture who has read the document and automate reminders.

The out of the box system provides:

- 1 Document Library
- Standardised Permissions
- Up to 8 Groups

Where required this can be altered / updated to add additional functionality using tokens or during the scoping the additional requirements can be scoped out as a fixed price change request. *Please note that the following describes the minimum project package available for this solution. Additional features can be agreed and quoted accordingly, for example, additional libraries. These can be agreed post-Scoping Session.*

Controlled Documents

Deliverable	Cost
Controlled Document Scoping Session	**£750**
Controlled Documents – ISO / QMS / Policies An automated system used for tracking and automatically reviewing Office documents. • 1 Document Library with Major, Minor and Version Control. • Review / Approval Workflow for automated timed review of documents. • Document tracker – to track who has read documents (Up to 8 Teams for Approval Groups). • Homepage & Search created to navigate the system. • The client is responsible for uploading and configuring the metadata with Valto assistance.	**£4,500**
Controlled Documents – Training • ½ Day Training session that can be recorded and provided afterwards. • User Guide and Video provided.	**£750**
12 Tokens – Change Requests & Support Tokens that can be used for ongoing support, changes, and additions. • Support, Training, Development & Changes. • Raise tickets by emailing our support portal, remote assistance only. • Helpdesk Hours are Monday to Friday 08.30 – 17.00. • 1 Token = 1 Hour of Time Charged in 0.5 increments. * *Minimum option – Higher volume preferential pricing options available.* **Tokens are discounted as part of this package. Typical cost is £1920 based on £160 per Token.*	**£1,500**
Total Cost (All prices are exclusive of VAT)	**£7,500**

Valto Token Support

Preferential Pricing for Higher Volume Commitment

Valto customers could purchase tokens for support and development and call on these as required. These are for remote assistance only, charged in half hour blocks and do not expire (unless they haven't been used for a 12-month period). The costings for this are as follows:

Tokens	Cost
40	£4,750
80	£9,000
160	£16,000

Timelines

These are the typical timelines for a SharePoint project:

Type	
Controlled Document Scoping Session 1. Gathering Requirements 2. Discuss Options	Typically booked **2-3 weeks** after receiving PO.
Controlled Documents Deployment 1. Deployment 2. Configuration 3. Training	**3-5 weeks** following Project Scoping Workshop.

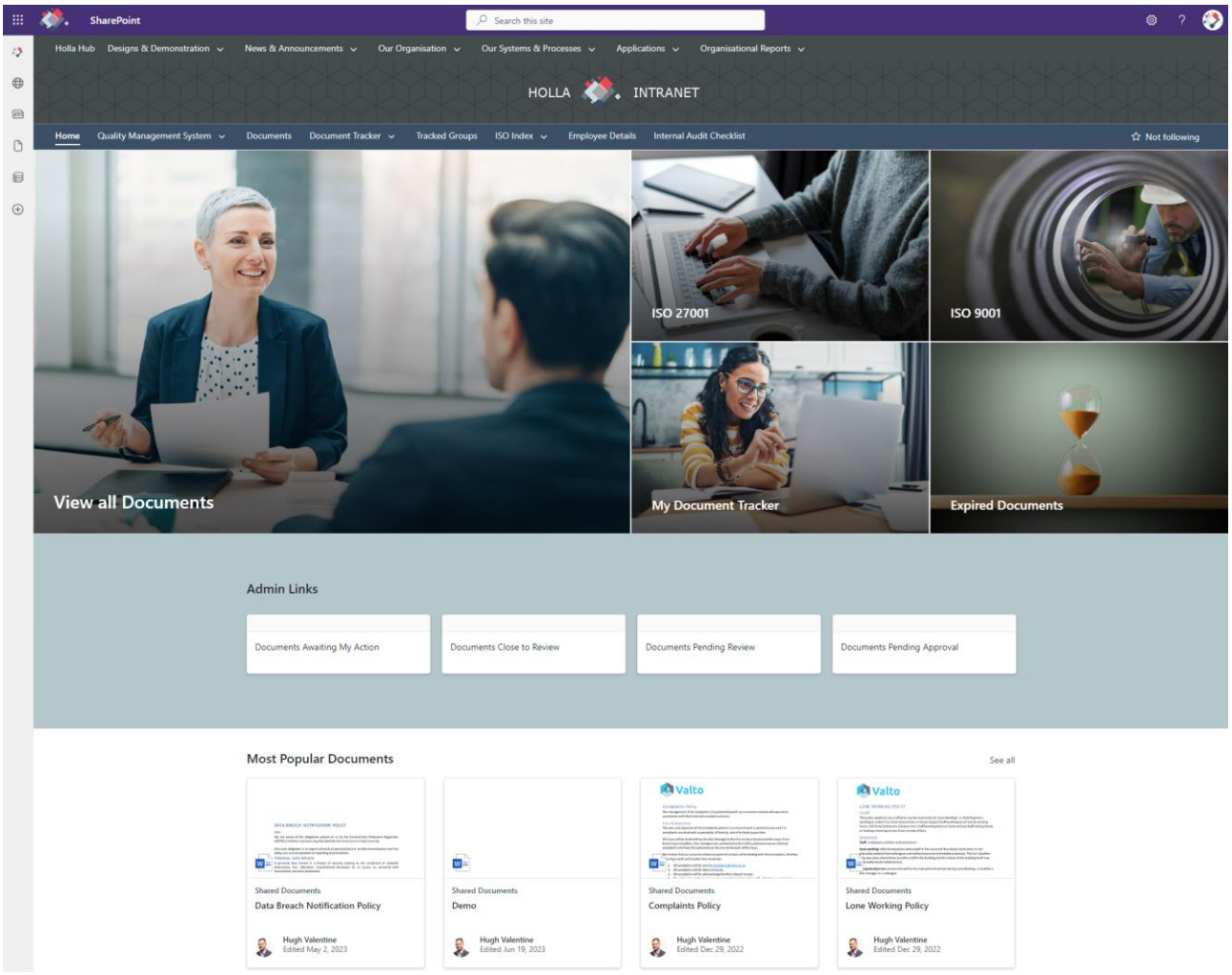
Prerequisites

We will require the following for information during the workshop to commence this project:

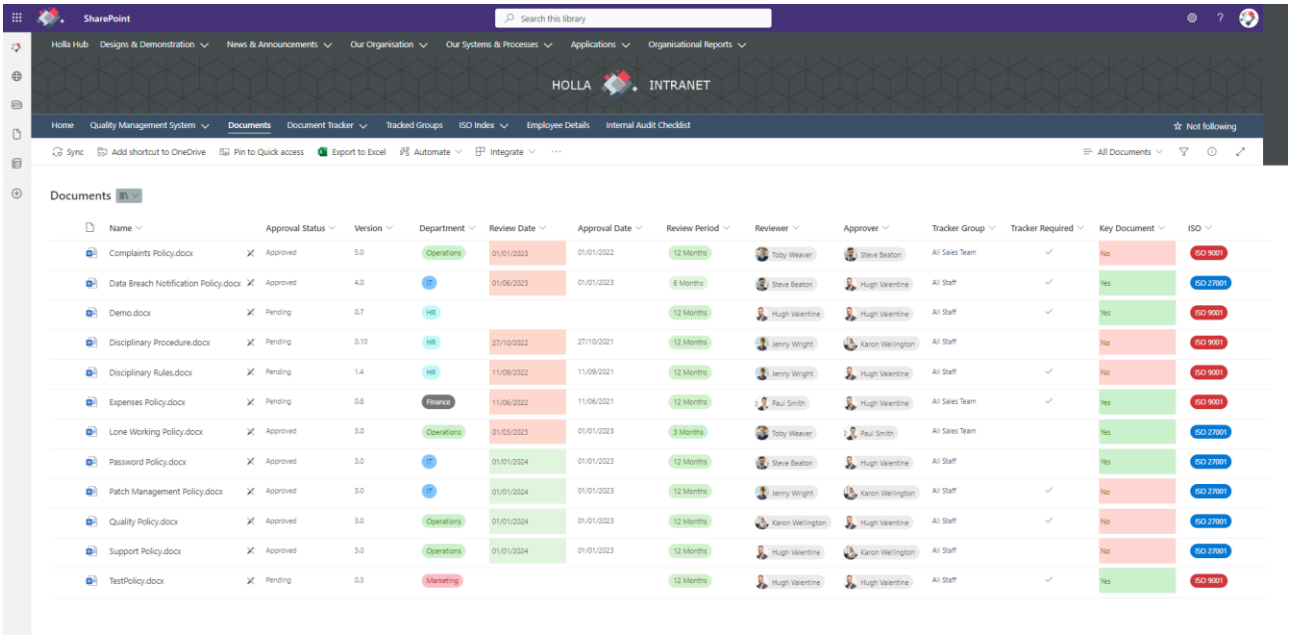
- Team / Group Names
- Categories

Example Images

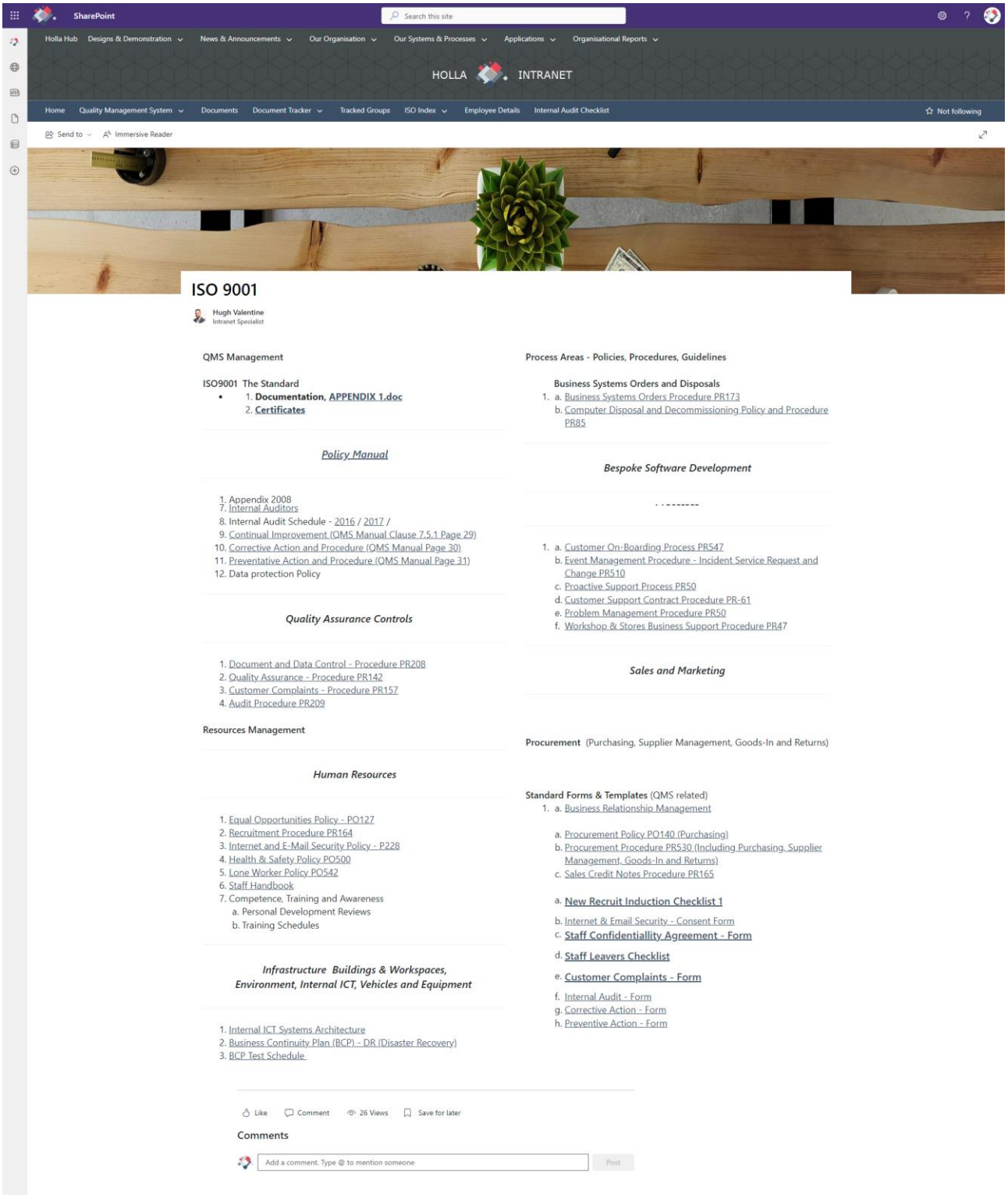
Example Homepage



Documents Page

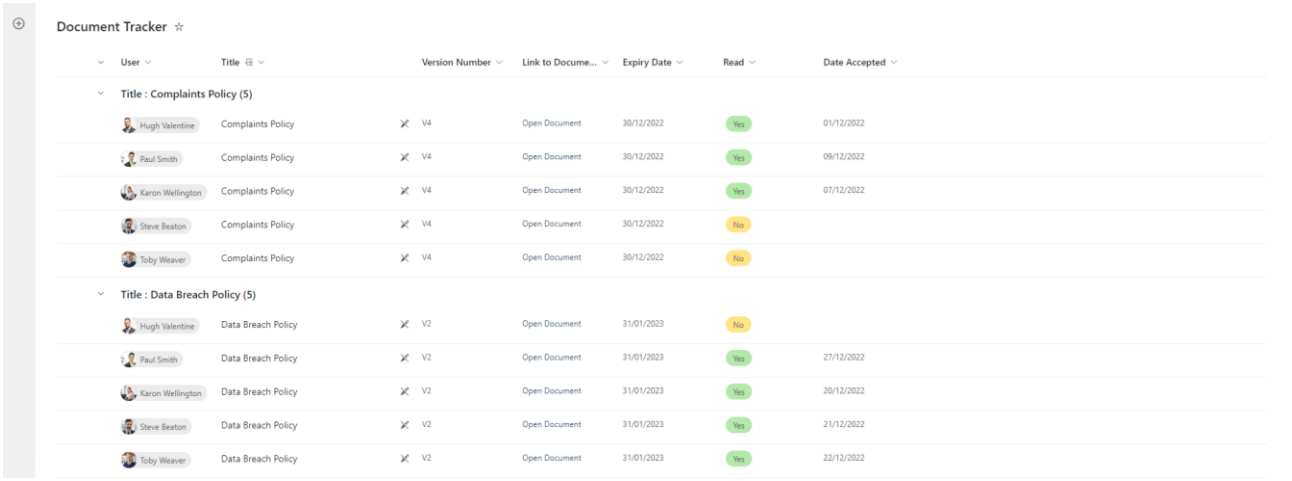


ISO Example Page

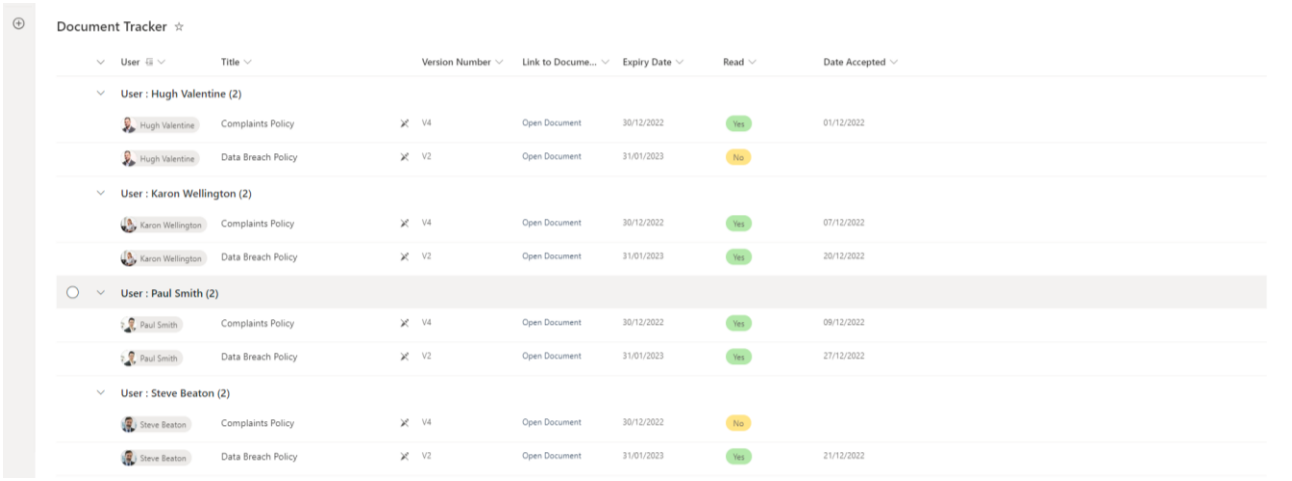


Policy Tracker

Group By Policy



Group By User



Version History

