OCTAWARE®
A WalkingTree Group Company

Microsoft Solutions Partner

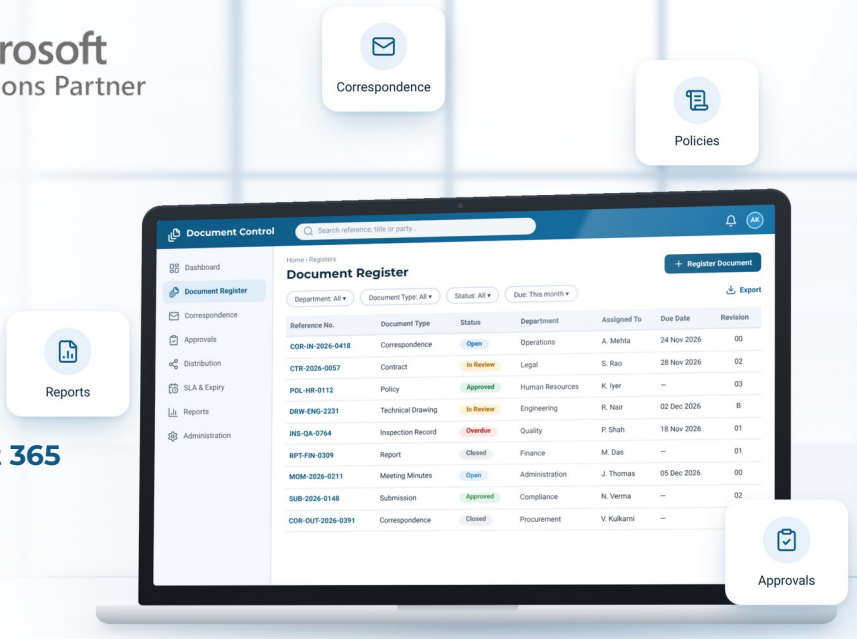
STRUCTURE | CONTROL | COLLABORATE

# Bring Every Document Under Control.

## Enterprise Document Control on Microsoft 365

Manage business documents, correspondence and approvals through one structured document-control environment built on Microsoft 365.

BOOK A DISCOVERY CALL →




THE CHALLENGE

### When Documents Are Scattered, Control Becomes Difficult.

**Missed Deadlines**
Important reviews and responses go unnoticed.

**Scattered Information**
Documents spread across emails and shared folders.

**Version Confusion**
Outdated documents reach the wrong teams.

**Manual Distribution**
Routing and follow-ups rely on individuals.

THE SOLUTION

### A Structured Approach to Document Control.

Organise documents, workflows and responsibilities around your business processes.

- Clear ownership and routing
- Controlled revisions and approvals
- Traceable records and timelines

HOW IT WORKS

### From Document Registration to Closure.

01 REGISTER — 02 CLASSIFY — 03 ROUTE — 04 NOTIFY — 05 TRACK — 06 CLOSE

KEY CAPABILITIES

### Six Controls That Bring Structure to Every Document.

**Automatic Numbering**
Consistent document references.

**Distribution Matrix**
Rule-based routing and notifications.

**SLA & Expiry Tracking**
Monitor deadlines and reminders.

**Correspondence Threading**
Connect related communications.

**Revision & Approval Control**
Manage reviews and document versions.

**Audit-Ready Reports**
Export records and registers.

BUSINESS DOCUMENTS AND RECORDS

## One Framework. Multiple Business Processes.

Configure document-control workflows around your organisational requirements.

- Correspondence and Communications
- Contracts and Agreements
- Policies and Procedures
- Technical Documents and Drawings
- Submissions and Approval Records
- Inspection and Compliance Records
- Reports and Meeting Minutes
- Operational and Project Deliverables

BUSINESS VISIBILITY

## Make Document Status and Responsibilities Visible.

**Structured Document Registers**
Organise documents with consistent references and metadata.

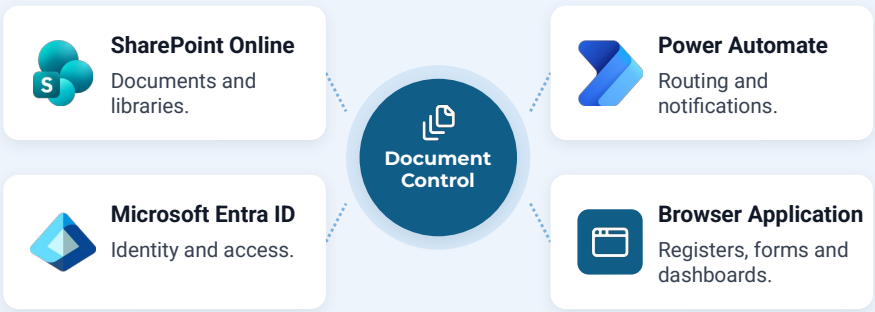
**Workflow & Accountability**
Route actions to the right people.

**Management Visibility**
Track pending items and overdue actions.

**Traceability & Control**
Maintain document history and audit records.

MICROSOFT 365 FOUNDATION

## Built Within Your Microsoft 365 Environment.




### Your Documents. Your Tenant. Your Governance.

Operate within your Microsoft 365 environment, using your organisation's configured identity, access and governance framework.

- ✓ Structured access
- ✓ Controlled confidential records
- ✓ Existing governance alignment

BUSINESS VALUE

## Better Control. Clearer Accountability. Greater Visibility.

- Greater visibility into document status
- Less manual tracking and follow-ups
- Better revision and approval control
- Improved traceability and reporting

## Bring Document Control Into Your Organisation.

Explore a document-control framework configured around your business processes and Microsoft 365 environment.

BOOK A DISCOVERY WORKSHOP →