

Construction operations: the operative's guide

Use this guide once work has started. You record what happened on site, encode measured quantities, prepare documents for review, and follow their completion. You do not turn daily-log approval into financial acceptance, or sign on behalf of the Control Officer merely because you prepared the document.

Your handoff: reviewable daily evidence, a submitted Measurement Book with clear quantity/basis information, and a prepared Situation based on issued work. The officer's decision and internal completion are separate checkpoints.

The [preparations guide](#) is for the manager who sets up your project. The [Control Officer guide](#) describes the review/signing handoff. Use the [general manual](#) for the complete reference.

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Start your working day

Check the company, **PMIS Project**, and **Site** before entering work. Ask the project manager to resolve missing scope, responsibilities, or routes; do not create a second project just because a filter hides the first one.

Your account needs **PMIS Field Service User** for encoding logs, **Measurement Operator** for measurements, and **Situation Operator** for preparing Situations, as applicable. Preparing/sending cases also requires the relevant operational responsibility and sign-off access. The **Bills of Quantities** → **Operations** navigation needs Sales access through its parent menu. Ask the administrator if your assigned task has no visible entry point.

Keep these figures separate in the Training Pavilion example:

You are recording	Example	Meaning
Planned scope	100 m ²	Manager's BoQ plan.
Work described/measured	40 m ²	Actual activity and measurement, not all accepted.
Quantity proposed for acceptance	38 m ²	Two m ² still need finishing.

You are recording	Example	Meaning
Situation certification after issuance	38 × USD 25 = USD 950	Work value, not material cost.
Explicit delivery material	2 mounting plates	Stock units, not service area.

There is no automatic conversion from the diary into measurements. You must enter and justify the quantities, and the officer must review them.

1. Record the daily site evidence

Open the correct log

- 1. Open your Field Service order. Check its **PMIS Project** and **PMIS Site**.
- 2. Click **Create Daily Log**. This can reopen the newest visible same-day draft; check the date and reference before creating another log.
- 3. Alternatively, open **Bills of Quantities** → **Operations** → **Field Operations** → **Construction Daily Logs** and create a standalone log. Project is required; site and Field Service order are optional.
- 4. Check **Responsible Person**, company, and site conditions.

Field ServiceDashboardOperationsMaster DataReporting

NewOrdersFO001Daily Logs11 / 1

Create Daily LogCompleteCancel OrderNewCompleted

FO001

Type ?Location ?Training Pavilion – East Wing

Priority ?☆☆☆Assigned To ?

DESCRIPTION

Install panels in East Wing. Synthetic training order.

RESOLUTION

Enter the resolution for the order...

PlanningInstructionsExecution

REQUIREMENTS

Earliest Request Date ?10/06/2026 09:00:00

Latest Request Date ?

SCHEDULE DETAILS

Scheduled Start (ETA) ?

Scheduled Duration ?0.00

Scheduled End ?

PMIS CONTEXT

PMIS Project ?Training Pavilion

PMIS Site ?East Wing

REQUEST WORKERS

Name	Phone	Email	Working Schedule
Add a line			

Send messageLog noteActivities

Today

System

Today at 9:00 AM

Field Service Order created

Operative starts a daily log from the Field Service order with project/site context

Describe what actually happened

Work through the tabs rather than putting every fact into one paragraph:

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

6

0

Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Construction Daily Logs

GDN/26/00001

Attachments

0

1 / 1

<

>

Create Correction

Draft

Submitted

Reviewed

Approved

Send message

Log note

Activities

Q

0

Follow

GDN/26/00001

Date ?

10/06/2026

Field Service Order ?

F0001

PMIS Project ?

Training Pavilion

FSM Location ?

Training Pavilion — East Wing

PMIS Site ?

East Wing

FSM Team ?

Default Team

Contractor ?

Assigned FSM Person ?

Investor ?

Assigned FSM Persons ?

Responsible Person ?

Demo Operator

SITE CONDITIONS

Weather ?

Clear

Work Start ?

Temperature ?

18 °C

Work End ?

Site Conditions ?

East Wing accessible; working area secured.

Downtime Hours ?

0.00

Downtime Reason ?

Narrative

Diary Entries

Personnel

Machinery and Equipment

Material Evidence

Review and Correction

Product	Material Description	Material C...	Quantity	Uom	Reference	Picking	Notes
Demo Mou...	Mounting plates ob...	Delivery	2.00	Units	DEMO-EVI...		Informational daily evidence only; no stock transaction.

Today

Demo Operator

Today at 9:05 AM

Reviewed → Approved (State)

Demo Operator

Today at 9:05 AM

Submitted → Reviewed (State)

Demo Operator

Today at 9:05 AM

Draft → Submitted (State)

Demo Operator

Today at 9:00 AM

PMIS Construction Daily Log created

Material Evidence records two plates as site information, not a stock transaction

An optional picking link points to an existing stock document. Entering material evidence or linking that picking does not execute a delivery or consumption.

Submit and wait for the reviewer

5. Save and use **Submit**. Supply a narrative or at least one diary entry.
6. Hand the log to the daily-log reviewer. **Review** and **Approve** belong to the **PMIS Field Service Manager**, not the ordinary encoding user.
7. Check the final state afterward. Approval locks the business evidence; it does not create measurements, certify work, or move stock.

Bills of Quantities Operations Analytics Sign-off Configuration 7 Demo Construction D Demo Operator pmis_manual_demo_20261006

New Construction Daily Logs GDN/26/00001 Attachments 0 1 / 1

Create Correction Draft Submitted Reviewed **Approved** Send message Log note Activities

GDN/26/00001

Date ?	10/06/2026	Field Service Order ?	F0001
PMIS Project ?	Training Pavilion	FSM Location ?	Training Pavilion – East Wing
PMIS Site ?	East Wing	FSM Team ?	Default Team
Contractor ?		Assigned FSM Person ?	
Investor ?		Assigned FSM Persons ?	
		Responsible Person ?	Demo Operator

SITE CONDITIONS

Weather ?	Clear	Work Start ?	
Temperature ?	18 °C	Work End ?	
Site Conditions ?	East Wing accessible; working area secured.	Downtime Hours ?	0.00
		Downtime Reason ?	

Narrative Diary Entries Personnel Machinery and Equipment Material Evidence Review and Correction

Planned Activities ? Install 40 m² of panels in the East Wing.

Daily Operational Narrative ? Crew worked on 40 m². Two square meters need finishing before acceptance. This is synthetic training evidence.

Instructions and Notices ?

Supervision Findings ? 38 m² ready for acceptance; 2 m² require finishing.

Inspections and Tests ?

Deviations and Incidents ?

Safety and Quality Records ? Work area isolated; no incidents in this training scenario.

Corrective Measures ?

Today

- D Demo Operator Today at 9:05 AM
 - Reviewed → **Approved** (State)
- D Demo Operator Today at 9:05 AM
 - Submitted → **Reviewed** (State)
- D Demo Operator Today at 9:05 AM
 - Draft → **Submitted** (State)
- D Demo Operator Today at 9:00 AM
 - PMIS Construction Daily Log created

Approved daily log retains the narrative and its approval state

2. Enter the measurements

1. Open **Bills of Quantities** → **Analytics** → **Measurements** → **Measurement Books**.
2. Create a book for the correct BoQ, project/site, period, **Responsible**, and **Control Officer**. Confirm the assigned officer with the project manager.
3. Open **Open Active Iteration** or the **Measurement Lines** tab. The initial overview shows **Iterations**; that list is not the quantity editor.
4. Review the draft lines. Initial measured/accepted values can default to the remaining planned scope. Replace them with actual quantities.
5. Enter **40** measured and then **38** accepted for the example. Changing the measured quantity can default accepted quantity to the same value, so set the final accepted value afterward and recheck both.
6. Enter the measurement basis, calculation, drawing reference, and notes needed to explain the result. Do not ask the officer to reconstruct missing evidence.
7. Use **Update Lines from Bill of Quantities** for missing scope items; it does not overwrite your existing draft quantities.

Measurement Book overview: check the period, BoQ, responsible person, and officer before opening the active iteration

3. Send the Measurement Book for sign-off

1. On the book, click **Submit**, then **Financial Sign-off** as the authorized responsible Measurement Operator.
2. On the case, click **Prepare for Sign-off**. Review the prepared document evidence and the document/revision it refers to.
3. Click **Send for Sign-off**. The case moves to **Awaiting Sign-offs**.
4. Give the officer the case reference and the supporting measurement context. The officer follows the [review guide](#); you wait for their decision rather than recording it with your own account.

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

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Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Sign-off Cases

SOF/26/00001

1 / 1

Record Sign-off

Cancel

Draft

Prepared

Awaiting Sign-offs

Accepted

Returned

Rejected

Completion Error

Send message

Log note

Activities

2

1

Following

Name ?

SOF/26/00001

TARGET

SIGN-OFF WORKFLOW

Target Display Name ? KOI/26/00001

Workflow ? Measurement Book Financial Sign-off

Target Model ? pmis.measurement.book

Pmis Project ? Training Pavilion

Target Res ? 1

Pmis Site ? East Wing

Document Revision ? 1

Prepared Datetime ? 10/06/2026 09:05:31

Accepted Datetime ?

Signature Status ? Unsigned

Completion Status ? Not Started

Sign-offs

Technical / Audit Evidence

Completion

CURRENT SIGN-OFF

Current Sign-off Step ? Measurement Book Financial Sign-off / 10 / Control Officer

Current Role ? Control Officer

Pending Reviewers ? Demo Control Officer

Completed Sign-offs ? 0

Required Steps ? 1

Signed Datetime	Workflow Step	Role Code	Outcome	Signer Name	Reason

Prepared measurement sign-off case is the operative's handoff to review

If the Control Officer is external

At the pending Control Officer step, click **Send Control Officer Signature**. The assigned active contact needs an email address and no active internal Odoo account. A portal user or a contact without any user account can sign.

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

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NewMeasurement Book IterationsIteration 1Situations01 / 1

Print Draft / RecordOpen Issued PDF

DraftIssued

Send messageLog noteActivities

This iteration is issued and immutable. The issued PDF snapshot is the historical record.

Reference?
KOI/26/00001/001

Iteration 1

Book?KOI/26/00001

Sequence?1

PMIS Project?Training Pavilion

Iteration Start?

Site?East Wing

Iteration End?

Bill of Quantities?East Wing Installation Scope

Control Officer?Demo Control Officer

Investor / Vendor?Demo Customer

Issue Datetime?10/06/2026 09:05:39

Issued By?Demo Control Officer

Editable LinesIssued SnapshotIssued EvidenceSituations

Book	BoQ Item	Uom	Planned Qty	Previous Acc...	Current Mea...	Current Acce...	Cumulative ...	Remaining P...	Measur...	Ca
	#10: Panel ...	m²	100.00	0.00	40.00	38.00	38.00	62.00	Site inspection: 40 m² installed; 2 m² pending finishing.	

Today

Demo Control OfficerToday at 9:05 AM
• Draft → Issued (State)

Demo Control OfficerToday at 9:05 AM
Measurement Book Iteration issued.

SystemToday at 9:00 AM
Measurement Book Iteration created

Issued iteration shows the measured, accepted, and remaining quantities

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

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NewMeasurement Book IterationsIteration 1Situations11 / 1

Print Draft / RecordOpen Issued PDF

DraftIssued

Send messageLog noteActivities

This iteration is issued and immutable. The issued PDF snapshot is the historical record.

Reference?
KOI/26/00001/001

Iteration 1

Book?KOI/26/00001

Sequence?1

PMIS Project?Training Pavilion

Iteration Start?

Site?East Wing

Iteration End?

Bill of Quantities?East Wing Installation Scope

Control Officer?Demo Control Officer

Investor / Vendor?Demo Customer

Issue Datetime?10/06/2026 09:05:39

Issued By?Demo Control Officer

Editable LinesIssued SnapshotIssued EvidenceSituations

Line Nu...	BoQ Item C...	BoQ Item Description	Uom Name	Current Mea...	Current Acce...	Measurement Basis
1 10		Panel Installation – East Wing	m²	40.00	38.00	Site inspection: 40 m² installed; 2 m² pending finishing.

Today

Demo Control OfficerToday at 9:05 AM
• Draft → Issued (State)

Demo Control OfficerToday at 9:05 AM
Measurement Book Iteration issued.

SystemToday at 9:00 AM
Measurement Book Iteration created

Issued Snapshot is retained measurement evidence, not the next editable draft

An automatically created next draft is not proof that the accepted book can be resubmitted for a new period through the same clicks. Use the manager-agreed next-period process; the general manual uses a new book. The demo's retained issued PDF has a **Draft / Provisional Print** label despite **Issued** model state: check the issued record/evidence and flag that presentation discrepancy.

5. Prepare the temporary sale Situation

1. Open **Bills of Quantities** → **Analytics** → **Valuation** → **Situations**.
2. Create a **Temporary** Situation for the same sale BoQ, company, project/site, and period. Set issue date, **Responsible**, and **Control Officer**.
3. Click **Generate Lines** to select eligible issued measurement work.
4. Check the actual measurement links and the period's selection. **Generate Lines** does not filter measurements by the Situation period dates.
5. Verify **38 m²** at **USD 25**, totaling **USD 950** in the example. Work-line certification comes from linked accepted measurements; do not use an unlinked manually typed quantity as a substitute.

The screenshot displays the 'Situations' interface for SIT/26/00001. The top navigation bar includes 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. The user is 'Demo Operator' with a profile icon. The main content area is split into two panels. The left panel, titled 'Material Delivery', shows details: 'Material Delivery Status' (Delivered), 'Completion Requested By' (Demo Operator), 'Automated Completion User' (Demo Operator), 'Delivery Requested At' (10/06/2026 09:10:14), 'Invoice Status' (Draft), 'PMIS Sign-off Case' (SOF/26/00002), 'Signed Situation Snapshot' (SIT/26/00001-signoff.pdf), 'Revision' (1), and 'Measurement Book Iterations' (Iteration 1). The right panel, titled 'REPRESENTATIVES', shows 'Our Authorised Representative' (Demo Control Officer) and 'Investor Representative'. Below this is a table with columns: 'Situation Lines', 'Totals', 'Material Consumption', 'Delivery and Actual Cost', and 'Certification Sign-off'. The table has rows for 'Reserved De...', 'Delivered an...', 'Net Delivered ...', 'Price Unit', 'Current Certifi...', 'Cumulative ...', 'Cumulative Ce...', 'Remaining Q...', and 'Remaining Val...'. The right sidebar shows a 'Send message' button and a list of activities, including 'Demo Operator' messages about 'Not Paid', 'Accepted', 'Draft Invoice prepared', 'Customer-facing Situation certification completed', 'Customer delivery, stock valuation, and stock accounting verified', 'Draft', 'Submitted', and 'PMIS Situation created'.

Certified-work links identify the measurements feeding the Situation

Classify material before sending

For every included work line and accepted variation line:

- If material delivery applies, select **Delivery Material**, a compatible **Delivery Material Unit**, and positive **Delivery Material Quantity**. The example uses **2 mounting plates**, separately from 38 m² of service.
- If no material applies, clear the delivery product/unit/quantity and enter a useful **No Material Reason**. Do not leave the classification undecided.
- Resolve draft variations with the responsible reviewer; only accepted variations contribute invoice lines.

Bills of Quantities

Operations

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Demo Construction

Demo Operator

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New

Situations

SIT/26/00001

1 / 1

Material Delivery Status

Delivered

Completion Requested By

Demo Operator

Automated Completion User

Demo Operator

Delivery Requested At

10/06/2026 09:10:14

Invoice Status

Draft

PMIS Sign-off Case

SOF/26/00002

Signed Situation Snapshot

SIT/26/00001-signoff.pdf

Revision

1

Measurement Book Iterations

Iteration 1

REPRESENTATIVES

Our Authorised Representative

Control Officer

Demo Control Officer

Investor Representative

Situation Lines

Totals

Material Consumption

Delivery and Actual Cost

Certification Sign-off

Delivery M...	No Materi...	Delivery M...	Delivery M...	Delivery Mat...	Reserved De...	Delivered an...	Net Delivered ...	Price Unit	Current Certifi...
Material de...	Demo Mou...	Units		2.00	0.00	2.00	14.00	25.00	950.00

Send message

Log note

Activities

Following

Today

Demo Operator

Today at 9:10 AM

None

Not Paid

(Payment Status)

Submitted

Accepted

(State)

Demo Operator

Today at 9:10 AM

Situation accepted; draft invoice Draft Invoice prepared.

Demo Operator

Today at 9:10 AM

Customer-facing Situation certification completed.

Demo Operator

Today at 9:10 AM

Customer delivery, stock valuation, and stock accounting verified.

Demo Operator

Today at 9:08 AM

Draft

Submitted

(State)

Demo Operator

Today at 9:08 AM

PMIS Situation created

Situation line columns distinguish certified work from explicit material delivery

Scroll the wide Lines table horizontally to review all material columns. This screenshot shows a completed record: delivered quantity **2** and material cost **14** are later results, not preparation values to type.

- Review **Totals**, then click **Submit** and **Certification Sign-off**.
- On the case, use **Prepare for Sign-off**, then **Send for Sign-off**.
- For an external officer, use **Send Control Officer Signature** at the pending Control Officer step; otherwise hand the case to the internal officer.

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Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Situations

SIT/26/00001

1 / 1

Combined Actual Material Cost ?

14.00

Situation Material Delivery ?

WH/OUT/00002

Material Delivery Status ?

Delivered

Completion Requested By ?

Demo Operator

Automated Completion User ?

Demo Operator

Delivery Requested At ?

10/06/2026 09:10:14

Invoice Status ?

Draft

PMIS Sign-off Case ?

SOF/26/00002

Signed Situation Snapshot ?

SIT/26/00001-signoff.pdf

Revision ?

1

Measurement Book Iterations ?

Iteration 1

REPRESENTATIVES

Our Authorised Representative ?

Control Officer ?

Demo Control Officer

Investor Representative ?

Situation Lines

Totals

Material Consumption

Delivery and Actual Cost

Certification Sign-off

Amount Previous ?

\$ 0.00

Amount Current ?

\$ 950.00

Amount Cumulative ?

\$ 950.00

Amount Remaining ?

\$ 1,550.00

Send message

Log note

Activities

1

Following

Today

Demo Operator

Today at 9:10 AM

None

→

Not Paid

(Payment Status)

Submitted

→

Accepted

(State)

Demo Operator

Today at 9:10 AM

Situation accepted; draft invoice Draft Invoice prepared.

Demo Operator

Today at 9:10 AM

Customer-facing Situation certification completed.

Demo Operator

Today at 9:10 AM

Customer delivery, stock valuation, and stock accounting verified.

Demo Operator

Today at 9:08 AM

Draft

→

Submitted

(State)

Demo Operator

Today at 9:08 AM

PMIS Situation created

Totals show USD 950 currently certified and USD 1550 remaining

The prepared Situation PDF shows certification values but does not print the material mapping. Review the source Lines and **Technical / Audit Evidence** → **Canonical Manifest** alongside the PDF. Unclassified included lines block preparation. Submission by itself moves no stock and posts no accounting entries.

6. Follow certification and completion

Check both statuses on the case, not only the signature row:

Screen result	What it means for you
Awaiting Sign-offs	A required decision is still outstanding.
Signature Status: Signed	Signature evidence is recorded; business completion may still be outstanding.
Completion Error	Preserve the signature and hand the error to the authorized internal responsible.
Accepted and Completion Status: Completed	Required positive decisions and the applicable completion actions succeeded.

Accepted case separates Signed signature status from Completed completion status

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Situations
SIT/26/00001
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Signed Situation Snapshot
SIT/26/00001-signoff.pdf
Revision
1
Measurement Book Iterations
Iteration 1

REPRESENTATIVES

Our Authorised Representative
Control Officer
Demo Control Officer
Investor Representative

Situation Lines	Totals	Material Consumption	Delivery and Actual Cost	Certification Sign-off
Situation Material Delivery	WH/OUT/00002			
Material Delivery Status	Delivered			
Completion Requested By	Demo Operator			
Automated Completion User	Demo Operator			
Delivery Requested At	10/06/2026 09:10:14			
Gross Delivery Cost	14.00			
Returned Delivery Value	0.00			
Net Delivery Cost	14.00			
Stock Valuation Status	Verified			
Stock Accounting Status	Posted			
Linked Invoice / Bill	Draft Invoice			
Invoice Status	Draft			
Payment Status	Not Paid			

Send message

Log note

Activities

Following

Today

D Demo Operator Today at 9:10 AM

- None → Not Paid (Payment Status)
- Submitted → Accepted (State)

D Demo Operator Today at 9:10 AM

- Situation accepted; draft invoice Draft Invoice prepared.

D Demo Operator Today at 9:10 AM

- Customer-facing Situation certification completed.

D Demo Operator Today at 9:10 AM

- Customer delivery, stock valuation, and stock accounting verified.

D Demo Operator Today at 9:08 AM

- Draft → Submitted (State)

D Demo Operator Today at 9:08 AM

- PMIS Situation created

Delivery and Actual Cost shows stock, valuation, accounting, and invoice status separately

Under **Certification only**, no automatic invoice is expected. With draft/post invoice policies, the internal completion actor needs the applicable Accounting permissions. Portal completion uses the requesting operator's current rights; internal direct signing initially uses the final signing actor's rights.

7. Correct problems without replacing evidence

What happened	Your next action
Daily log rejected	Read the review reason, use Return to Draft , correct, and resubmit.
Approved daily log is wrong	Ask the Field Service Manager to enter Correction Reason and Create Correction . Work on the new revision; do not overwrite the approved original.
Book/Situation returned or rejected	Read the officer's reason. Use the source document's supported rejection/draft revision flow, correct, resubmit, and prepare the new revision's case.
Prepared document changed or invitation became stale	Stop asking for signatures. Have the authorized operator resolve the revision/case and replace an unsigned invitation as applicable.
Signature saved, completion failed	Read the case's Completion error and hand it to the configured internal completion responsible. Do not ask for another signature to fix stock/accounting rights.

The authorized responsible can use **Complete Signed Situation** or **Retry Delivery Completion** after correcting prerequisites. That is not an ordinary encoding-user permission. Retry retains the signed revision/evidence.

Bills of Quantities Operations Analytics Sign-off Configuration 6 1 Demo Construction D Demo Operator pmis_manual_demo_20261006

New Sign-off Cases SOF/26/00002 1 / 1

Complete Signed Situation Draft Prepared Awaiting Sign-offs Accepted Returned Rejected **Completion Error** Send message Log note Activities

Name [?]
SOF/26/00002

TARGET	SIGN-OFF WORKFLOW
Target Display Name [?] SIT/26/00001	Workflow [?] Temporary Situation Certification Sign-off
Target Model [?] pmis.situation	Pmis Project [?] Training Pavilion
Target Res [?] 1	Pmis Site [?] East Wing
Document Revision [?] 1	Prepared Datetime [?] 10/06/2026 09:08:30
	Accepted Datetime [?]
	Signature Status [?] Signed
	Completion Status [?] Completion Error

Sign-offs Technical / Audit Evidence **Completion**

Completion Datetime [?]

Completion Retry Count [?] 0

Completion Last Error [?] You are not allowed to create 'Journal Entry' (account.move) records.

This operation is allowed for the following groups:

- Invoicing/Invoicing
- Purchase/User

Contact your administrator to request access if necessary.

Completion Last Retry User [?]

Completion Last Retry Datetime [?]

Completion User [?]

Planned Activities

D Today: "Complete Signed Situation" for Demo Operator [?]
SOF/26/00002 for SIT/26/00001 failed at Precondition: You are not allowed to create 'Journal Entry' (account.move) records. This operation is allowed for the following groups: - Invoicing/Invoicing - Purchase/User Contact your administrator to request access if necessary.
✓ Mark Done ✎ Edit ✕ Cancel

Today

D Demo Control Officer Today at 9:08 AM
• Awaiting Sign-offs → **Completion Error** (State)

D Demo Control Officer Today at 9:08 AM
Sign-off record recorded.

D Demo Control Officer Today at 9:08 AM
Sign-off target completion failed: You are not allowed to create 'Journal Entry' (account.move) records. This operation is allowed for the following groups: - Invoicing/Invoicing - Purchase/User Contact your administrator to request access if necessary.

D Demo Operator Today at 9:08 AM
• Prepared → **Awaiting Sign-offs** (State)

D Demo Operator Today at 9:08 AM
Sign-off case moved to review.

D Demo Operator Today at 9:08 AM
• Draft → **Prepared** (State)

D Demo Operator Today at 9:08 AM
Sign-off record prepared.

D Demo Operator Today at 9:08 AM
Sign-off case created.

D Demo Operator Today at 9:08 AM
PMIS Sign-off Case created

Completion Error retains the signature while identifying a completion problem

Keep the original and corrected daily-log references together. Source attachments remain on the original; review what evidence the correction needs. The original is superseded when the correction is approved, not simply created.

Separate task: internal material consumption

Only use this section if you are also the authorized operational confirmer. Otherwise hand it to the responsible Operations/Stock colleague.

1. Use a separate **Purchase / Inside** BoQ/Situation, not the customer sale certification route.
2. Enter positive **Internal Confirmed Quantity** for applicable material lines and submit the Situation.
3. With **PMIS Operations Manager, Stock User**, and responsibility on the project and selected site, use **Confirm Material Consumption**.
4. Review **Material Consumption** and its picking. Available untracked material can complete automatically; unavailable/tracked material needs warehouse processing. Use authorized **Retry Stock Completion** where applicable.

Separate purchase consumption shows actual consumed quantity and material cost

Done stock moves/valuation establish actual consumption cost. A pending picking does not. This route does not certify customer work or automatically create a vendor bill; the demo remains **Submitted** even after consumption is Done.

Before handing over

- ☐ Daily evidence identifies the correct date, site, people, and activities.
- ☐ Measured and accepted quantities are distinct and justified.
- ☐ Reviewers have the book/case references and supporting context.
- ☐ Situation work links to issued measurements, not guessed quantities.
- ☐ Material classification is explicit and invoice expectations are understood.
- ☐ Outstanding signatures, completion errors, and corrections have named owners.

About the screens

Screens are reused actual synthetic Odoo captures, not mockups. October 6 screens show the worked financial example; **Demo Operator** had several training roles, so do not assume every displayed button belongs to your account. The October 11 external-case screen is from a separate zero-value, certification-only Situation demo. Capture evidence is available for the [main workflow](#) and [OCA portal option](#). This guide does not claim new runtime verification of repeat-period workflows, represented signing, shortages/tracking failures, or returns.