

Construction work preparations: the project manager's guide

Use this guide before the crew starts work. Your job is to make the project, scope, people, review route, and material routes ready so the operative can record work without having to invent configuration on site.

Your handoff: a configured project and site, a usable Bill of Quantities, named operational and completion responsables, and a clear Control Officer signing route. Creating these records does not certify work or move stock.

This guide uses Odoo 18 Community and the current PMIS project-delivery workflow. Use the [general manual](#) for the complete reference, the [operative's guide](#) once work starts, and the [Control Officer's guide](#) for review/signing.

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Before you start

Ask the application administrator to confirm that the project-delivery apps and their dependencies are installed, including OCA Sign for external PDF/portal signing. Installation, user-account administration, and company accounting setup are administrator tasks, not something to solve while entering a project.

Your access depends on the task, not merely on your job title:

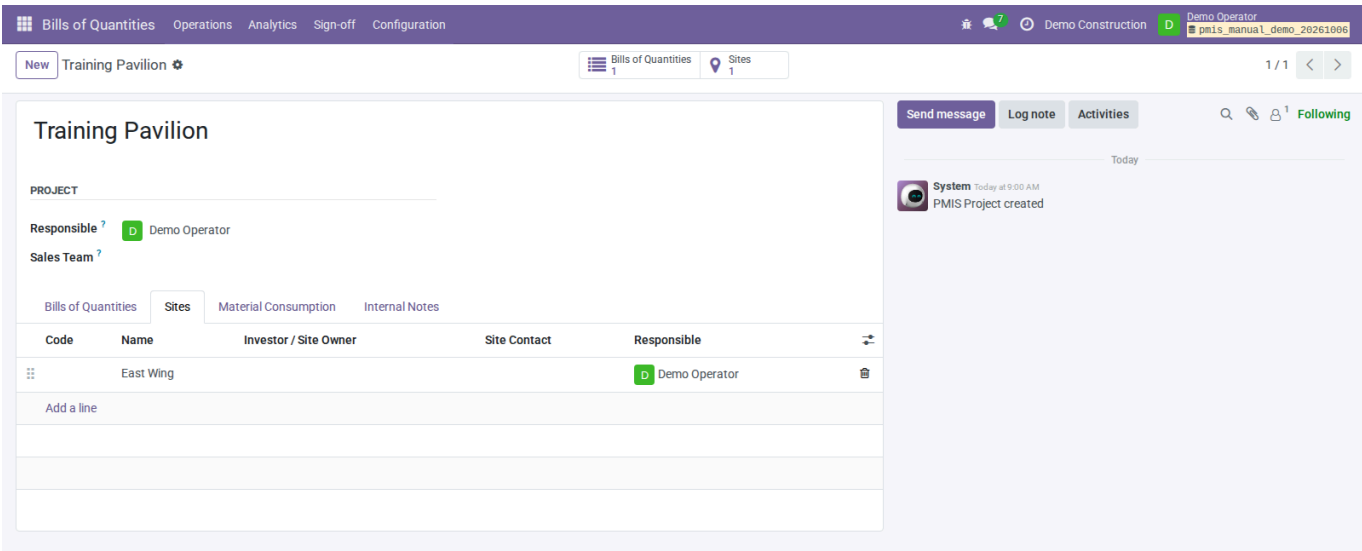
What you configure	Access to arrange
Project and sale BoQ	Sales access to Bills of Quantities ; Program Estimation for restricted financial-estimation fields.
Sites	Applicable Measurement Operator or PMIS Valuation Manager access and the parent menu.
Sign-off workflows and authorities	PMIS Sign-off Manager and access to the Configuration menu.
Warehouse routes and availability	Coordinate with the authorized Stock/Operations user.
Company invoice policy	Coordinate with the authorized Settings/Accounting administrator.

Select the intended company before configuring anything. Project, site, BoQ, documents, people, and populated warehouse routes must belong to compatible company contexts. Manager membership alone does not give access to every project's sign-off case.

The example is **Training Pavilion / East Wing**: plan 100 m² of panel installation at USD 25/m². Later, the operative records 40 m² worked and proposes 38 m² for acceptance. Do not enter those later quantities as completed work now.

1. Create the project and sites

- 1. Open **Bills of Quantities** → **Operations** → **Projects** and click **New**.
- 2. Enter the project name and company. Set **Responsible** to the internal person who owns its operational work; select the team when applicable.
- 3. Save. If the project is missing from a list, check the company and remove the default current-user project filter before assuming it was not created.
- 4. Open **Bills of Quantities** → **Analytics** → **Sites** and create the working site, for example **East Wing**. Select the project and the site's **Responsible**.
- 5. Add site contact/owner information and useful **Site Notes**. Keep separate sites when responsibility or material routes differ.



Project manager sees Training Pavilion and its East Wing site

The screenshot displays the PMIS software interface for a site form. The top navigation bar includes 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. The user is logged in as 'Demo Operator' with a session ID 'pmis_manual_demo_20261006'. The main form is titled 'East Wing' and contains the following fields:

- Name:** East Wing
- Code:** (empty)
- PMIS Project:** Training Pavilion
- Responsible:** Demo Operator (indicated by a green 'D' icon)
- Investor / Site Owner:** (empty)
- Site Contact:** (empty)
- Sequence:** 10

Below these fields are two tabs: 'Material Consumption' (selected) and 'Site Notes'. The 'Material Consumption' tab is divided into two sections:

- SITE STOCK OVERRIDE:**
 - Material Consumption Source Location
 - Material Consumption Location
 - Material Consumption Operation Type
- TEMPORARY SALE DELIVERY OVERRIDE:**
 - Situation Delivery Source Location
 - Situation Delivery Customer Location
 - Situation Delivery Operation Type
 - Situation Completion Responsible

The right sidebar contains a 'Send message' button, 'Log note', and 'Activities' tabs. Below these is a notification from the 'System' dated 'Today at 9:00 AM' stating 'PMIS Project Site created'. The sidebar also shows a search icon, a bell icon with '1' notification, and a 'Following' status.

Site form: project, responsible person, contacts, and optional route overrides

Check before continuing: the operative knows which project and site to use. Creating a site does not automatically configure a warehouse route; blank site route fields use the project's corresponding defaults.

2. Define the planned work

1. On the project, open the **Bills of Quantities** smart button.
2. Create the customer BoQ with **Sale / Outside**, the customer, and the correct project/company. Use **Purchase / Inside** for a separate internal purchase scope, not for the customer's certification document.
3. Add the BoQ Items: section, clear description, product/service, unit, planned quantity, and agreed price. In the example: panel installation, **100 m²**, **USD 25/m²**.
4. Review units and scope with the operative. A stock item's units are not the same as the area of the service it supports.
5. If a quotation or RFQ is needed, use the applicable commercial-response wizard and the normal Sales/Purchase confirmation process. Draft responses are not evidence that work was measured, accepted, delivered, or invoiced.

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

7

Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

BoQ Items

#10: Panel installation – East Wing

1 / 1

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Panel installation – East Wing

Section ?

Assigned to ? Demo Operator

Dependencies ?

QUANTITY FLOW

Product ?

Panel Installation Service

Planned Qty ?

100.00

m²

Sales Order Qty ?

0.00

m²

Sales Delivered Qty ?

0.00

m²

Sales Plan Price ?

\$ 25.00

Plan Unit Cost ?

\$ 12.00

Sales Order Price ?

\$ 0.00

VALUE FLOW

Sales Plan Value ?

\$ 2,500.00

Plan Cost ?

\$ 1,200.00

Sales Order Value ?

0.00

Sales Order Cost ?

\$ 0.00

Sales Delivered Value ?

0.00

Sales Delivered Cost ?

\$ 0.00

Sales Invoiced Qty ?

0.00

Sales Invoiced Value ?

0.00

Sales Invoiced Currency Value ?

0.00

Sales Invoiced Cost ?

\$ 0.00

Description

General Info

SPECIFICATION

PROPOSED SOLUTION

Send message

Log note

Activities

Following

Today

Demo Operator

Today at 9:05 AM

System

→ Demo Operator (Assigned to)

System

Today at 9:00 AM

BoQ Item created

BoQ Item shows planned scope of 100 m² at USD 25 per m²

Your handoff: the operative can select the BoQ and its intended work items when creating the Measurement Book. Daily logs do not generate those items or their accepted measurements automatically.

3. Name the people and choose the signing route

Agree these assignments before the first document is submitted:

Person	What they do
Operational responsible	Records measurements/Situations and prepares/sends their sign-off cases.
Daily-log reviewer	Reviews and approves site evidence with PMIS Field Service Manager access.
Control Officer	Reviews the prepared document and records the decision/signature.
Situation Completion Responsible	Resolves authorized delivery/accounting completion and retries when necessary.

Set **Responsible** and **Control Officer** on each Measurement Book and Situation when they are created. Do not assume a project-level responsibility has automatically filled every document assignment.

Choose the Control Officer route:

Officer's situation	Route to prepare
Active internal Odoo user	PMIS Sign-off Officer , live project/site signing authority, and the document's Control Officer contact matching that user.
External contact or portal user, with no active internal account	Assign the active contact and a usable email address. The operative sends the case-created OCA PDF/portal invitation. No internal signing authority is needed for that contact.

Officer's situation	Route to prepare
Situation signature recorded through an internal presenter	Arrange separate presenter access/authority. This is not the OCA portal route and is not the represented-signing route for Measurement Books.

An external signature does not grant the operative additional business access. For external Measurement Book signing, arrange **PMIS Valuation Manager** access for the requesting internal operator so issuance can complete. For Situation delivery/invoicing, arrange the required internal Operations, Stock, and Accounting permissions. Do not give the external officer internal permissions just to make completion succeed.

4. Check the sign-off workflows and authority

1. Open **Bills of Quantities** → **Configuration** → **Sign-off Configuration** → **Sign-off Workflows**.
2. Check **Measurement Book Financial Sign-off** and **Temporary Situation Certification Sign-off** for the company. Ask the administrator to configure other companies explicitly when the supplied workflows do not apply.
3. Review active step order, **Role Code**, declaration, and **Declaration Version**. The standard workflows contain a Control Officer step. Other required steps must be completed in their configured order.
4. Agree the declaration before sending documents. Changing it during review can invalidate a pending external invitation.

The screenshot shows the 'Temporary Situation Certification Sign-off' configuration page. At the top, there's a navigation bar with 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. Below the navigation bar, there's a 'New' button and the page title 'Temporary Situation Certification Sign-off'. The main content area has a 'Target Model' dropdown set to 'pmis.situation' and an 'Active' checkbox checked. Below this is a 'Sign-off Steps' section with a table. The table has three columns: 'Role Code', 'Declaration Version', and 'Active'. The first row shows 'Control Officer' as the role code, 'pmis-situation-temporary-signoff-v1' as the declaration version, and a checked 'Active' checkbox. There is an 'Add a line' button below the table.

Manager checks the active Situation workflow and Control Officer step

For an **internal** Control Officer:

5. Open **Sign-off Authorities**. Set the project, optional site, **Purpose: Workflow Signing**, **Role Code: Control Officer**, and internal **User**.
6. Check **Active**, company eligibility, and that the document's Control Officer contact matches the intended user.
7. Use an exact-site authority when needed. Eligible exact-site authority takes precedence; eligible project-wide authority is the fallback.

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

6

0

Demo Construction

D

Demo Operator

pmis_manual_demo_20261006

New

Control Officer / Demo Control Officer / Training Pavilion / East Wing

1 / 1

<

>

Control Officer / Demo Control Officer / Training Pavilion / East Wing

Pmis Project ?

Training Pavilion

Pmis Site ?

East Wing

Purpose ?

Workflow Signing

Role Code ?

Control Officer

User ?

D

Demo Control Officer

Active ?

☒

Manager assigns Workflow Signing authority to the internal Control Officer for East Wing

For an **external** Control Officer, do not create an internal authority for a contact-only signer. The operative's **Send Control Officer Signature** button binds the invitation to the current assigned contact, case, step, and PDF.

Check: groups alone are not an internal signing mandate. A sign-off manager is not automatically entitled to approve every project document.

5. Set material routes and completion responsibility

With the authorized Stock/Operations colleague, open the project's **Material Consumption** tab. Configure only the routes the project will use.

Route	Source	Destination	Operation type / responsible
Temporary sale delivery	Company-owned Internal location	Company-owned Customer location	Company-owned outgoing operation type; Situation Completion Responsible .
Internal purchase consumption	Company-owned Internal location	Company-owned Production location	Company-owned consumption operation type; applicable project/site responsible.

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The screenshot shows the 'Training Pavilion' project page in the PMIS system. The top navigation bar includes 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. The user is logged in as 'Demo Operator' with a profile picture and a notification icon. The page title is 'Training Pavilion' with a 'New' button. Below the title, there are tabs for 'Bills of Quantities', 'Sites', 'Material Consumption', and 'Internal Notes'. The 'Material Consumption' tab is active. The page is divided into two main sections: 'PROJECT' and 'TEMPORARY SALE DELIVERY CONFIRMATION'. The 'PROJECT' section shows 'Responsible' as 'Demo Operator' and 'Sales Team' as 'Demo Operator'. The 'TEMPORARY SALE DELIVERY CONFIRMATION' section is divided into two sub-sections: 'PROJECT DEFAULT STOCK CONFIGURATION' and 'TEMPORARY SALE DELIVERY CONFIRMATION'. The 'PROJECT DEFAULT STOCK CONFIGURATION' section includes fields for 'Material Consumption Source Location' (WH/Stock), 'Material Consumption Location' (Demo Site Consumption), and 'Material Consumption Operation Type' (Demo Construction: Internal Transfers). The 'TEMPORARY SALE DELIVERY CONFIRMATION' section includes fields for 'Situation Delivery Source Location' (WH/Stock), 'Situation Delivery Customer Location' (Demo Customer Delivery), 'Situation Delivery Operation Type' (Demo Construction: Delivery Orders), and 'Situation Completion Responsible' (Demo Operator). On the right side of the page, there is a sidebar with a 'Send message' button, a 'Log note' button, and an 'Activities' button. Below these buttons, there is a search bar and a list of activities. The first activity is 'System' with a timestamp 'Today at 9:00 AM' and a description 'PMIS Project created'. The sidebar also shows a 'Following' status.

Project manager reviews separate internal-consumption and customer-delivery routes

1. Confirm the intended source, destination, and operation type with the warehouse.
2. Set the internal **Situation Completion Responsible** for customer completion.
3. On each site, populate only values that should override project defaults; each blank value falls back independently.
4. Arrange source availability and any lot/serial allocation with the warehouse.
5. For automated valuation, have Accounting/Inventory confirm valuation accounts and the stock journal before certification is due.

Stop if: a populated route points to another company or a shared destination without the company required by this workflow. Do not substitute an arbitrary location merely to remove an error.

No material needs delivery for some work lines. The operative must explicitly classify those lines rather than inventing a product/quantity.

6. Agree the invoicing policy

Ask the authorized administrator to open **Settings** → **PMIS Bills of Quantities** → **Temporary Situations** → **Invoice policy** for the active company.

Policy	What the team should expect after successful certification/completion
Certification only	No automatic invoice; this is the default.
Prepare draft invoice	A linked draft is prepared; Accounting reviews/posts it separately.
Prepare and post invoice	The configured completion flow prepares/posts with the necessary permissions.

This is a **company** policy, not a per-project promise. Agree it with Accounting and tell the operative which result to expect. Posting and payment are different events. A valid signature can remain recorded even if subsequent accounting completion fails.

7. Hand over a ready project

Before work starts, check the following with the operative:

- ☐ Correct company, project, site, customer/vendor, and BoQ are identifiable.
- ☐ Planned work, units, quantities, and prices are agreed.
- ☐ Operational and daily-log review responsibilities are named.
- ☐ Internal Control Officer authority or external contact/email is ready.
- ☐ Company workflows and declarations are agreed.
- ☐ Needed material routes, availability, and completion responsibility are ready.
- ☐ Invoice policy and the Accounting handoff are understood.
- ☐ The operative can open their project, daily logs, and Measurement Books.

If Field Service orders are used, have the responsible Field Service user set **PMIS Project** and **PMIS Site** on the order. The operative can then use **Create Daily Log** with the correct context rather than re-entering it daily.

Hand over the [construction operations manual](#) and send the officer the [Control Officer manual](#). Keep configuration decisions with the project team; do not ask the officer to repair warehouse or accounting setup while signing.

When something is missing

What you see	What to check or hand off
Missing menu or price field	Ask the administrator for the task-specific access; do not switch to another person's login.
Operative cannot prepare/send a case	Document/project/site operational responsibility, applicable operator groups, and company.
Internal officer cannot review/sign	Active internal user, company, matching assigned contact, and live project/site role authority.
External invitation unavailable	Assigned active external contact, email, pending Control Officer step, and installed/upgraded OCA integration.
Signature recorded but completion fails	Route, stock/tracking, issuance, or accounting prerequisite; the authorized internal responsible resolves/retries.

About the screens

Screens are actual synthetic Odoo captures reused from the October 6 demo, not mockups. **Demo Operator** combined several training roles; your menus/buttons depend on your own permissions. These screens illustrate configuration and handoff, not proof that one least-privilege manager account can do every task. See the [capture evidence](#) and [general manual](#). No new production configuration or installation is implied by this guide.