

Control Officer: review and signing guide

Your task is to review the work and the prepared declaration, then record your own decision. You are not being asked to configure the project, encode the operative's measurements, or repair warehouse/accounting access to make a signature appear successful.

Use the route matching your account:

- **Internal Odoo user:** open your assigned case and record an authenticated decision in Odoo.
- **External contact or portal user with no active internal account:** review and sign the case-created OCA PDF invitation. No internal Odoo account is required; this route records acceptance only.

The [manager's guide](#) covers setup and assignment. The [operative's guide](#) covers the evidence you receive. The [general manual](#) is the complete cross-role reference.

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Before you decide

Check that the request names the correct document, company, project/site, period, and revision. Review the prepared evidence for that revision, not merely a current screen that may have changed since preparation.

For the Training Pavilion example, distinguish **100 m² planned**, **40 m² measured**, and **38 m² proposed for acceptance**. The two unfinished m² are not accepted simply because they appear in the daily activity narrative.

Document you review	Questions to answer
Measurement Book	Are the item/unit, measured versus accepted quantity, basis, calculation, and drawing/supporting evidence correct?
Temporary sale Situation	Does certified work match the linked issued measurements? Are price, prior/current/cumulative quantities, adjustments, and period selection justified?
Material classification on a sale Situation	Is each included line explicitly material-delivery or no-material, with a sensible product/unit/quantity where applicable?
Declaration	Is this the statement and version you intend to accept for this document revision?

In the financial example, 38 m² at USD 25 gives USD 950 of certified work. Two mounting plates are a separate stock quantity; their USD 14 cost is not the selling value you are certifying.

The Situation PDF currently does **not** print material mapping. Internal reviewers should check the Situation Lines and **Technical / Audit Evidence** → **Canonical Manifest** as well. External reviewers should request the relevant supporting material details from the operative before signing if they are not available in the PDF. The portal does not grant access to the PMIS source form.

If evidence is wrong or incomplete, stop and ask for correction. Do not approve the declaration simply to advance the workflow.

A. Review and sign as an internal Odoo user

Open your assigned case

You need an active internal account with **PMIS Sign-off Officer** access, allowed company access, and live project/site **Control Officer** authority. The document's **Control Officer** contact must match your user contact. Group membership alone is not authority for every project.

1. Select the correct company.
2. Open **Bills of Quantities** → **Sign-off** → **Pending Sign-offs** and select the assigned document's case. Your operational colleague can give you its reference.
3. Check **Target Display Name**, **Document Revision**, project/site, and workflow.
4. Check **Current Sign-off Step** and **Current Role**. The case must be awaiting sign-offs and your step must be current; preceding required steps cannot be skipped.
5. Review the prepared snapshot and the operative's measurement/supporting evidence. Ask the operative to explain discrepancies rather than editing the prepared revision yourself.

Decide on the Measurement Book

6. Click **Record Sign-off**.
7. Check the workflow step, your identity, **Signing Mode**, and **Declaration Text**. For this route, the mode is **Authenticated Odoo User**.
8. Select the outcome deliberately and enter a reason when required.
9. Click **Confirm Sign-off** only when the declaration matches your decision.

The screenshot displays the Odoo Sign-off interface. A modal window titled "Record Sign-off" is open, showing the following details:

- Case:** SOF/26/00001
- Workflow Step:** Measurement Book Financial Sign-off / 10 / Control Officer
- Role Code:** Control Officer
- Signer User:** Demo Control Officer
- Signer Name:** Demo Control Officer
- Signing Mode:** Authenticated Odoo User
- Declaration Text:** I confirm that I have reviewed this Measurement Book financial revision and record my sign-off on the prepared immutable evidence.
- Outcome:** Accepted
- Reason:** (empty field)

The background interface shows the case "SOF/26/00001" in the "Awaiting Sign-offs" state. The workflow diagram indicates the process from "Draft" to "Prepared" to "Awaiting Sign-offs". The "CURRENT SIGN-OFF" section shows the current step as "Measurement Book Financial Sign-off" and the role as "Control Officer".

Internal Control Officer reviews the Measurement Book declaration and confirms the decision

Outcome	What you are recording
Accepted	Positive acceptance of this prepared revision.
Accepted with Reservations	Positive acceptance with a stated reason/reservations; it does not pause delivery completion.
Returned	Send the revision back for correction, with a reason; it is not a positive approval.
Rejected	Reject the revision with a reason; it is not a positive approval.

Accepted with Reservations, Returned, and Rejected require a reason. Do not use reservations when you intend to prevent completion: both accepted outcomes are positive. The final required positive decision attempts completion.

After successful Measurement Book completion, the book is accepted and the iteration is issued with retained line/PDF evidence. A freshly printed draft is not the issued record. Older screenshots show a retained provisional-print label; check **Issued** state and retained evidence if that label causes doubt. The current [signed measurement PDF](#) shows the issued revision and a visible demonstration signature.

Decide on the Situation

Follow the same case-review steps for **Temporary Situation Certification Sign-off**, checking the linked issued work, quantities, valuation, and material classification before recording the outcome.

The screenshot displays the Odoo Sign-off interface. A modal titled "Record Sign-off" is open, showing details for case "SOF/26/00002". The modal includes the following fields:

- Case: SOF/26/00002
- Workflow Step: Temporary Situation Certification Sign-off / 10 / Control Officer
- Role Code: Control Officer
- Signer User: Demo Control Officer
- Signer Name: Demo Control Officer
- Signing Mode: Authenticated Odoo User
- Declaration Text: I confirm that I have reviewed this temporary Situation certification revision and record my sign-off on the prepared immutable Situation evidence.
- Outcome: Accepted
- Reason: (empty)

Buttons at the bottom of the modal are "Confirm Sign-off" and "Cancel". The background interface shows the case details and a workflow diagram.

Internal Control Officer reads the Situation certification declaration before confirming

Your last positive sign-off can initiate configured material delivery and accounting completion. It does not mean an invoice was paid. If your account lacks the completion permissions, your valid signature can remain recorded while the case reports **Completion Error**; the authorized internal responsible handles that error without asking you to sign again.

B. Review and sign through the OCA portal

Use this route only when you are the assigned active Control Officer contact and have no active internal Odoo account. A portal account is optional. An active internal officer continues to use route A.

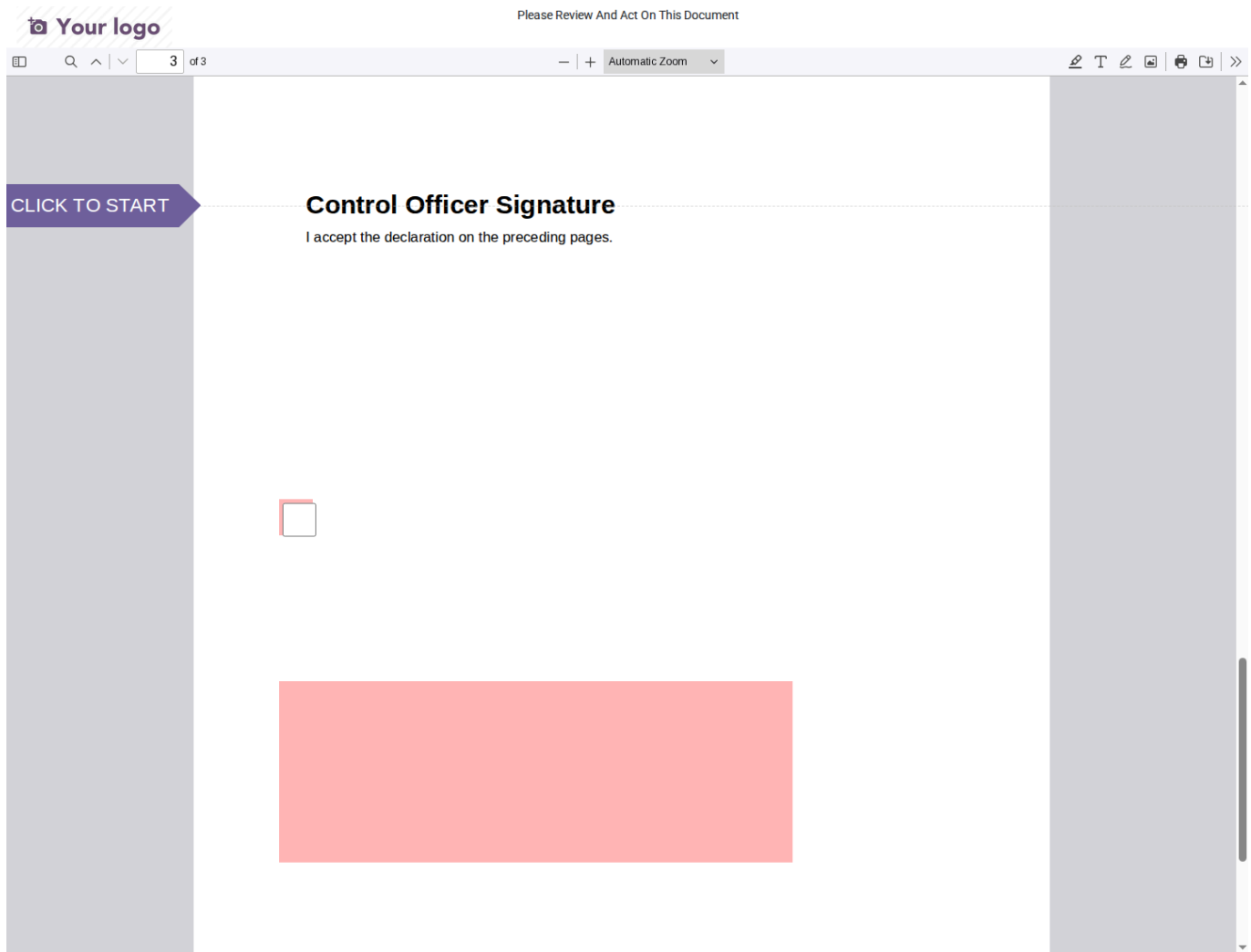
This route applies to **Measurement Books as well as temporary sale Situations**. Review the measurements before signing: approval is required for issuance, not just for the later financial Situation. For an external Measurement Book signature, the requesting internal operator needs **PMIS Valuation Manager** access to finish issuance; you do not need an internal account or internal business permissions.

The operative prepares the case and clicks **Send Control Officer Signature** at the pending Control Officer step. That creates a bound invitation for you; an ordinary OCA request linked only through **Object** is not PMIS approval.

Open and review the invitation

1. Open your OCA signing invitation link. Check the document title and contact identity. Do not forward your signing link or use a colleague's link.

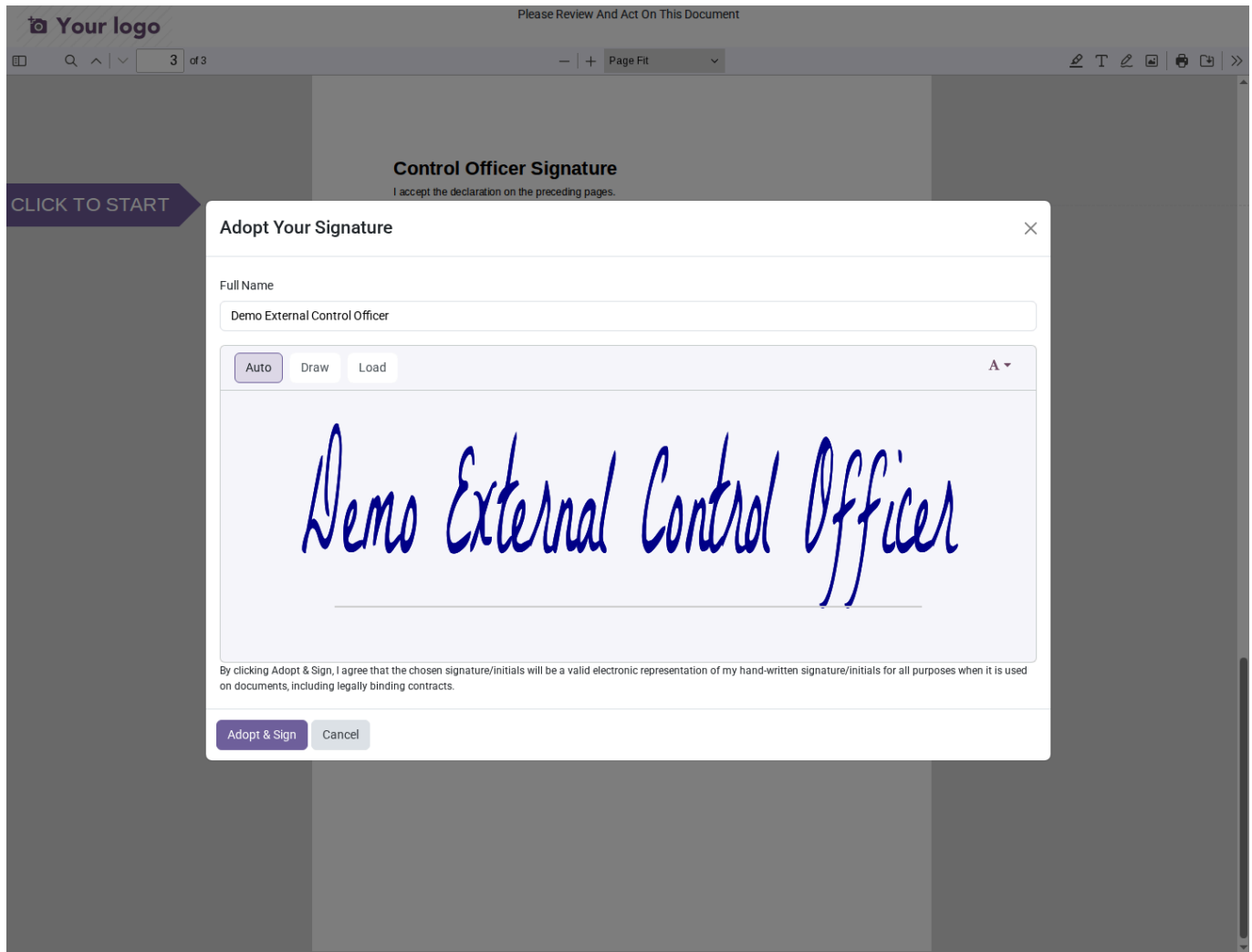
2. Review every prepared PDF page, including the appended declaration. Navigate to the final **Control Officer Signature** page only after that review.
3. Ask the operative for missing supporting evidence before continuing. The invitation lets you view/sign this PDF, not browse the PMIS project or case.



External officer sees the actual anonymous PDF portal and required acceptance/signature fields

Accept and capture your signature

4. Select the declaration acceptance checkbox on the signature page.
5. Activate the signature field; OCA opens **Adopt Your Signature**.
6. Check **Full Name**. Use **Auto**, **Draw**, or **Load** as appropriate for your intended signature. The screenshot demonstrates the **Auto** option.
7. Click **Adopt & Sign**. Check the acceptance checkbox and captured signature on the PDF before the final submission.



OCA's signature dialog shows the named external officer and Adopt & Sign

8. Click **Validate & Send document**. Adoption inside the dialog is not by itself the final document submission.
9. Wait for the portal's signing confirmation. Ask the operative to confirm the recorded outcome and completion status if you need the internal result.

The signed PDF prints the server-observed **Signing IP** and UTC signing time beside your signature. The same IP is retained in the immutable sign-off record. This may be a shared network or VPN address; it is audit evidence, not proof of your identity. Only the final submission collects the signing IP.

Please Review And Act On This Document

Your logo

3 of 3

Page Fit

CLICK TO START

Control Officer Signature
I accept the declaration on the preceding pages.

☒

Demo External Control Officer

Validate & Send document

Selected declaration checkbox and captured signature are ready for Validate & Send document

This portal route records **Accepted**, not reservations, return, or rejection. If you cannot accept the declaration, do not submit a signature. Tell the operative why and ask the team to resolve the document/review route.

The PDF and dialog wording do not establish qualified electronic-signature or statutory compliance. The confirmation page may refer to an email copy; receipt depends on the deployment's email setup and was not tested in the screenshot demo.

C. When an internal presenter records your Situation signature

This is a separate route, not portal signing. An authorized internal presenter may record **In-person Device Signature** or **Uploaded Paper Signature** for the assigned Control Officer on a Situation, with actor attestation and the required primary evidence. The record distinguishes you from the presenter.

Review the document/declaration before providing the signature or signed paper. Do not use the presenter's login as your own. If the original paper-signature date/time is unknown, the presenter leaves it unknown rather than inventing it. The supplied Measurement Book workflow does not use this represented route. There is no represented-signature screenshot here because that UI path has not been exercised in the existing screenshot demos.

Check what happened after signing

Signature recorded and **business completion completed** are different.

Result to ask for or inspect	Meaning
Your sign-off and outcome	Your decision is retained for this document/revision.
Signature Status: Signed	Signature evidence is recorded, even if completion still needs attention.
Accepted / Completion Status: Completed	All required positive decisions and applicable business completion succeeded.
Completion Error	Internal issuance, stock, or accounting needs attention; it does not erase the recorded signature.

The following two screenshots show the **internal operator's follow-up**, not extra screens granted to an external portal signer:

SOF/26/00002

1 / 1<>

DraftPreparedAwaiting Sign-offsAcceptedReturnedRejectedCompletion Error

Name
SOF/26/00002

TARGET

Target Display NameSIT/26/00002

Target Modelpmis.situation

Target Res2

Document Revision1

SIGN-OFF WORKFLOW

WorkflowTemporary Situation Certification Sign-off

Pmis ProjectTraining Pavillion – External Signature

Pmis Site

Prepared Datetime10/11/2026 05:53:55

Accepted Datetime10/11/2026 05:56:18

Signature StatusSigned

Completion StatusCompleted

Sign-offsTechnical / Audit EvidenceCompletion

CURRENT SIGN-OFF

Current Sign-off Step

Current Role

Pending Reviewers

Completed Sign-offs1

Required Steps1

Signed DatetimeWorkflow StepRole CodeOutcomeSigner NameReason

10/11/2026 05:56:18Temporary Situation Certification Sign-off / 10 / Control OfficerControl OfficerAcceptedDemo External Control Officer

Operator verifies the portal-signed case is Accepted, Signed, and Completed

SOF/26/00002 / Control Officer / Demo External Control Officer

Case	SOF/26/00002	Signing Mode	OCA PDF / Portal Signature
Workflow Step	Temporary Situation Certification Sign-off / 10 / Control Officer	Authenticated Signer	
Role Code	Control Officer	Signer Partner	Demo External Control Officer
Outcome	Accepted	Odoo Evidence Actor	
Reason		Presenter / Witness	
		Paper Recorder	
		Signer Name	Demo External Control Officer
		Signed Datetime	10/11/2026 05:56:18
		Signed Timezone	UTC

EVIDENCE

Document Revision	1
Declaration Version	pmis-situation-temporary-signoff-v1
Content Hash	9839be9ff206bf601aa9a347094178d5bb0f83e53662c86d738989bb5fc374d7
Snapshot Hash	d0b4f2883e7004b9b588129d08db9e25ee6152b3cccd09ddfa74570e663142e
Snapshot Attachment	SIT/26/00002-signoff.pdf
Captured Signature	
Signature Attachment Hash	
Primary Signed Document	SOF/26/00002-control-officer.pdf
Primary Signed Document Hash	7eea74946e518f3e637fa584f2d2faca8fc1b5013a039b9161f485ff992827b1
Oca Request	SOF/26/00002 / Demo External Control Officer
Oca Signer	Demo External Control Officer
Supporting Evidence	

I confirm that I have reviewed this temporary Situation certification revision and record my sign-off on the prepared immutable Situation evidence.

Retained sign-off identifies the external contact and OCA PDF / Portal Signature without inventing an internal signer or presenter

The original prepared PDF is preserved separately from the final OCA signed PDF. A recorded signature cannot be cancelled as an unsigned invitation. Corrections require the authorized document/revision process, not replacement of the retained signature file.

When you cannot proceed

What you see	Your next action
Internal case absent or access denied	Ask the manager to check your company, live authority, group, and matching document contact. Do not borrow another login.
Wrong document/revision or unclear measurements	Stop; ask the operative for correction or supporting evidence.
Your internal step is not current	Wait for preceding required steps; do not try to bypass them.
Portal invitation is invalid/stale	Ask the operative to check assignment, document, declaration, step, and internal requester eligibility, and replace an unsigned invitation where appropriate.
You need reservations or cannot accept in the portal	Do not submit; tell the operative that acceptance is not your decision.
Positive sign-off followed by Completion Error	Give the case/error reference to the internal completion responsible; do not repeat the signature to fix permissions.

Your final review checklist

- ☐ Correct company, project/site, document, period, and prepared revision.
- ☐ Measured versus accepted/certified quantities are justified.
- ☐ Required supporting evidence and material details have been reviewed.
- ☐ You understand the declaration and the effect of your chosen outcome.
- ☐ You are using your own account or your own named invitation.
- ☐ You distinguish recorded approval from stock/accounting completion.

About the screens

Screens are actual synthetic captures, not mockups. The internal decision screens show **Demo Control Officer** in the October 6 workflow. The external screens show a logged-out browser and **Demo External Control Officer** in a separate October 11, zero-value, certification-only Situation demo. They do not show the external officer reviewing the financial USD 950 example or a portal-signed Measurement Book.

See the [internal-demo evidence](#) and [OCA-demo evidence](#). Screens do not prove email delivery, qualified-signature compliance, or every failure path. Some older field captions differ from the current wording; follow the current declaration and outcome labels in your application.