

PMIS project delivery: scope, daily evidence, sign-off, and material cost

Joint user manual for pmis_assessment, pmis_field_service, pmis_signoff, and pmis_situation_stock on Odoo 18 Community.

Edition: October 6, 2026. **Source:** branch 18.0; inspected starting at revision e7177596, with no differences in the four addons at e02a0042. This edition combines source inspection with a running, isolated synthetic Odoo demo. The screenshots show actual application screens, not mockups. Measurement issuance, sale completion/retry, delivery valuation, draft invoicing, daily-log correction, and internal consumption were exercised. The diagram remains a workflow illustration. See [demo evidence](#) for verification scope.

October 11 addendum: external Control Officers can approve through OCA's PDF/portal signing without an internal Odoo account. The workflow below reflects the current 18.0 worktree, including the new sign_oca dependency.

Choose your role: [project manager: work preparations](#) · [construction operative: execution and measurements](#) · [Control Officer: review and signing](#). These illustrated guides follow each person's tasks and handoffs; this manual remains the shared cross-role reference.

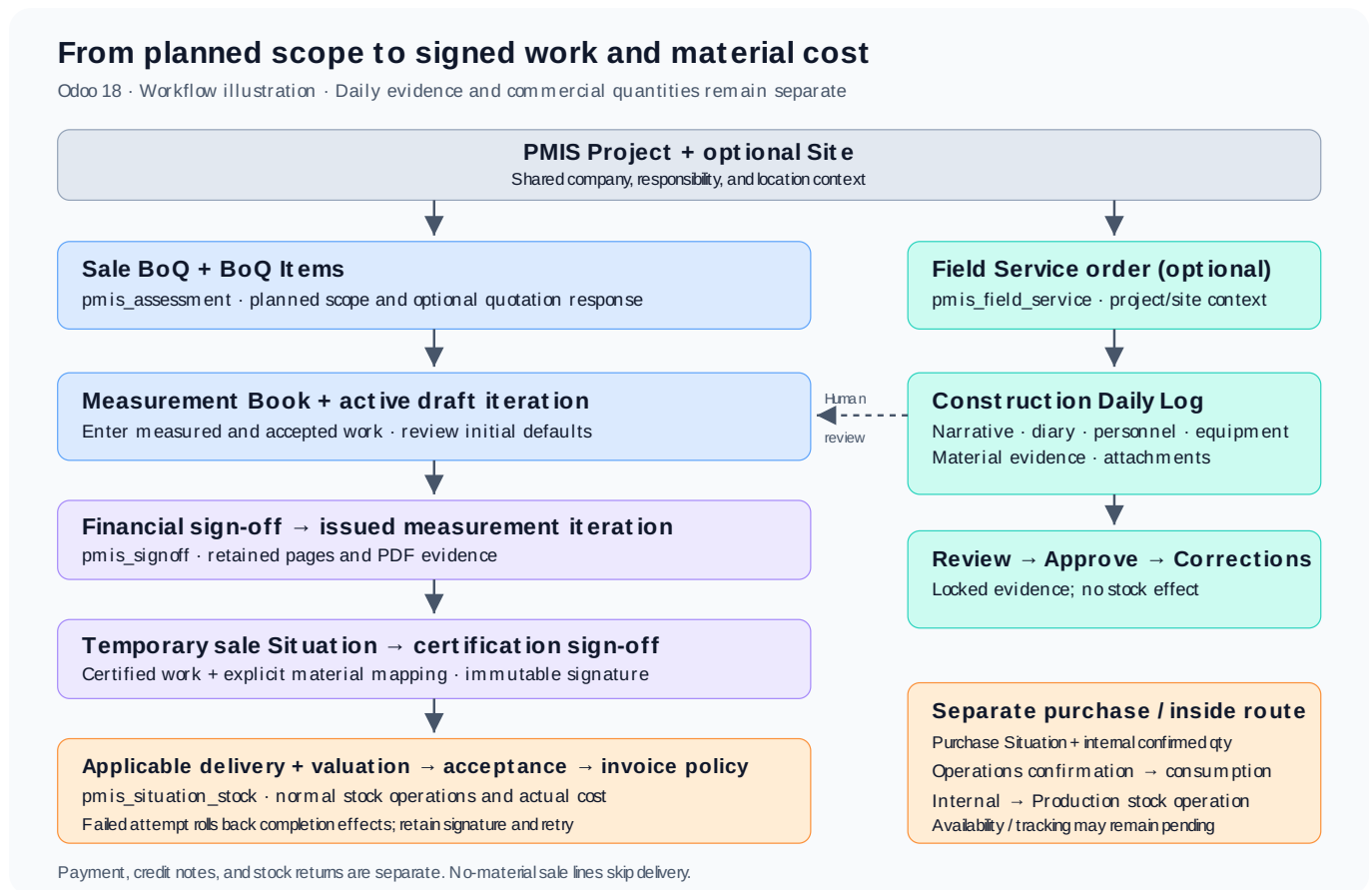
Media: [October 11 PDF reading copy](#) · [Narrated workflow overview](#) · [English captions](#). The PDF includes the October 11 OCA signing addendum; the video does not. The overview is a 3-minute 56-second diagram/text explainer with local synthesized narration. The manual now includes real Odoo screenshots. Video work is paused; the existing overview is unchanged and is not an Odoo screen recording.

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How the four addons work together

A **PMIS Project**, optionally divided into **Sites**, provides shared context. The commercial workflow plans scope, measures work, and certifies it in a Situation. Daily logs preserve the parallel operational story. Sign-off connects the reviewed document to its controlled completion actions.



Project delivery workflow with a separate daily-log evidence branch

Addon	User responsibility	Integration
pmis_assessment	Projects, sites, Bills of Quantities, BoQ Items, commercial responses, measurements, Situations, and invoice policy	Common context and commercial/valuation documents.
pmis_field_service	Field Service order context, Construction Daily Logs, diary, personnel, equipment, material evidence, and corrections	Same project/site; optional reference to an existing stock picking.
pmis_signoff	Workflows, authorities, document cases, declarations, signatures, and evidence	Issues measurement iterations and completes temporary sale certification.
pmis_situation_stock	Explicit sale Situation material delivery and internal purchase consumption	Normal stock operations and valuation before applicable sale acceptance/invoicing.

The customer flow is:

Project/site → sale BoQ → BoQ Items → Measurement Book → financial sign-off → issued iteration → temporary sale Situation → certification sign-off → applicable material delivery/valuation → acceptance → configured invoice action.

Daily-log approval does not create measurements, certify work, or move stock. A supervisor uses daily evidence when preparing and reviewing measurements; there is no automatic daily-log-to-Measurement-Book conversion.

Quotations/RFQs are commercial responses created from BoQ Items. Confirmation and ordinary order fulfillment remain separate workflows. Situation delivery uses its own explicit material mapping; an ordinary Sales delivery does not automatically fulfill that mapping.

Words and quantities

Interface term	Meaning
PMIS Project	Common project container (pmis.project).
Site	Optional subdivision of one PMIS Project.
Bill of Quantities (BoQ)	Sale / Outside or Purchase / Inside scope; internally a CRM record of type demand.
BoQ Item	Planned product/service, quantity, price/cost, section, and downstream links (pmis.assessment).
Construction Daily Log	Dated operational narrative and supporting evidence.
Measurement Book	Current measured and accepted quantities against BoQ Items.
Iteration	Draft or issued measurement pages; issuance retains immutable line/PDF evidence.
Situation	Work valuation/certification document with contractual work and adjustments.
Sign-off case	One prepared document revision, workflow steps, and immutable evidence.

Keep these quantities separate:

- **Planned:** original BoQ scope.
- **Measured:** work recorded in the Measurement Book.
- **Accepted:** measurement quantity retained in issued evidence.
- **Certified:** work included in Situation lines; contractual work derives from linked accepted measurements.
- **Delivery Material Quantity:** explicit stock quantity on a temporary sale Situation line; product and unit may differ from the certified work.
- **Internal Confirmed Quantity:** Operations-approved consumption quantity on a purchase Situation, independent of customer certification.
- **Daily-log material quantity:** informational delivery/consumption/return/waste/ storage evidence; it does not execute a transaction.

People and access

Task	Access and assignment
Project/BoQ and sales response	Sales user; Program Estimation exposes restricted financial estimation fields/report values. Purchase responses also need Purchase permissions.
Record/read daily logs	PMIS Field Service User / read-only PMIS Field Service Viewer .
Review/approve/correct daily logs	PMIS Field Service Manager .

Task	Access and assignment
Prepare/send book sign-off	Measurement Operator , with operational responsibility resolved from document/project/site.
Prepare/send Situation sign-off	Situation Operator , with the corresponding operational responsibility.
Direct Control Officer signature	PMIS Sign-off Officer , live project/site signing authority, and user contact matching the document's Control Officer .
External Control Officer signature	Assigned contact with an email address and no active internal Odoo account; signs the case-created OCA invitation. A portal account is optional.
Represented Situation signature	PMIS Represented Sign-off Presenter , with separate project/site presenter authority.
Configure workflows/authorities	PMIS Sign-off Manager .
Retry signed sale completion	Configured Situation Completion Responsible , with PMIS Operations Manager , Stock User , and invoice permissions for the selected draft/posting policy.
Confirm internal consumption	PMIS Operations Manager and Stock User ; acting user responsible on both project and selected site, if present.

Companies, projects, sites, and linked documents must be consistent. Direct signers and presenters are internal company-allowed users. Represented Situation signing can record the assigned Control Officer's signature without giving that person an Odoo signing account. Alternatively, the external Control Officer can sign remotely through OCA's PDF/portal invitation; no internal signing authority or PMIS case access is granted to that contact.

Invoice-permission handoff: automatic completion first runs in the final signing actor's context for internal signatures, or the requesting internal operator's context for OCA portal signatures. With a draft/posting invoice policy, that internal actor needs the applicable Accounting access for immediate completion. A sign-off-only Control Officer can retain a valid positive signature while completion fails. The configured, properly authorized completion responsible can then retry without a new signature. This exact handoff was observed in the demo; do not grant the Control Officer broad Accounting permissions merely to hide the distinction.

Case/evidence access is scoped to effective signers, presenters, operational users, and eligible completion responsables. Manager membership, company membership, or following chatter does not alone grant case access. Daily logs instead use company rules and Field Service groups; within an allowed company, they are not restricted to project members.

The **Bills of Quantities** → **Operations** → **Field Operations** menu also requires Sales user access through its parent menu. Accessible FSM orders provide a **Daily Logs** smart button.

Prepare the configuration

Addons

Have an administrator install the four addons and their declared dependencies in the intended environment. All four were installed in the isolated synthetic demo for this edition; no existing business database was modified.

Addon	Declared dependencies
pmis_assessment	sale_crm, account, purchase, product

Addon	Declared dependencies
pmis_field_service	pmis_assessment, OCA fieldservice, stock
pmis_signoff	pmis_assessment, OCA sign_oca
pmis_situation_stock	pmis_signoff, stock_account

Assessment alone does not install sign-off. Situation Stock brings sign-off through its dependency; Field Service remains a separate branch.

Workflows and signing authority

1. Open **Bills of Quantities** → **Configuration** → **Sign-off Configuration** → **Sign-off Workflows**.
2. Check the company-specific **Measurement Book Financial Sign-off** for target `pmis.measurement.book`.
3. Check **Temporary Situation Certification Sign-off** for target `pmis.situation` and target key `situation_sale_temporary`.
4. Configure active ordered steps, role, declaration, and declaration version. Supplied workflows target the main company and each have one Control Officer step. Configure other companies explicitly.
5. Open **Sign-off Authorities**. Assign active workflow-signing authority to the internal Control Officer for the project, optional site, and role.
6. For represented Situation signing, assign purpose `represented_presenter` to the internal presenter, without a role.
7. Set **Responsible** and **Control Officer** on the documents.
8. For OCA PDF/portal signing, assign an external Control Officer contact with a valid email address. Keep OCA Sign and its dependencies in the addon paths; have an administrator upgrade `pmis_signoff` before using this option. Internal Control Officers continue to use the authority workflow above.

The screenshot shows the SAP Sign-off Configuration interface. The breadcrumb navigation at the top reads: **Control Officer / Demo Control Officer / Training Pavilion / East Wing**. Below this, the configuration details are displayed in a table-like format:

Pmis Project ?	Training Pavilion	Purpose ?	Workflow Signing
Pmis Site ?	East Wing	Role Code ?	Control Officer
		User ?	Demo Control Officer
		Active ?	☒

Site-specific Control Officer authority for the synthetic project

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

6

8

Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Temporary Situation Certification Sign-off

1 / 1

Target Model ?

pmis.situation

Active ?

☒

Sign-off Steps

Role Code

Declaration Version

Active

Control Officer

pmis-situation-temporary-signoff-v1

☒

Add a line

The temporary sale Situation workflow and its Control Officer declaration

Eligible exact-site authority takes precedence for the same purpose/role; eligible project authority is the fallback. Groups alone do not establish authority.

Material routes

Open the project's **Material Consumption** tab. Each populated site value overrides its matching project default; blank values use project defaults.

Setting	Internal purchase consumption	Temporary sale delivery
Source	Company-owned Internal location	Company-owned Internal location
Destination	Company-owned Production location	Company-owned Customer location
Operation type	Company-owned consumption operation type	Company-owned outgoing operation type
Responsible	Project/site responsible user	Situation Completion Responsible

Shared destinations without a company do not satisfy these explicit route checks.

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Record/quantity	Example
Customer / sale BoQ	Demo Customer / East Wing installation scope
BoQ Item	Panel installation service: 100 m ² at 25 currency units/m ²
Daily narrative	Crew worked on 40 m ² ; 2 m ² need finishing before acceptance.
Measurement	Current measured 40 m ² ; current accepted 38 m ²
First Situation	Current certified 38 m ² ; current value 950 before taxes/adjustments
Explicit material mapping	2 units of Demo Mounting Plate
Observed stock cost	USD 7 per plate; delivery cost USD 14
Remaining work	62 m ² , valued at 1,550 at unchanged planned price

The 38 m² of service, 2 stock units, and stock cost 14 are different measures. Cost comes from Done stock valuation layers, not service selling price. Taxes, variations, and retention are omitted in this example.

Verified demo

Captures were taken on October 6, 2026, from Odoo 18 Community using the current four-addon checkout. **Demo Operator** combines estimation, measurement, Situation, daily-log management, Stock, and Accounting permissions for this training exercise. **Demo Control Officer** is a separate authenticated signer with site-specific authority, without Accounting access. Separate users should be configured according to real responsibilities outside the demo.

Check actually performed	Observed result
Daily log Submit → Review → Approve	Approved evidence; stock move count unchanged.
Measurement sign-off	Book accepted; iteration issued; real PDF snapshots retained.
Generate Situation lines	Issued measurement supplied 38 m ² at 25, totaling USD 950.
First positive Situation signature	Signature stored; completion failed because the signing actor lacked invoice-create access; no delivery picking or invoice remained.
Responsible user's completion retry	Same revision, signature count, content hash, and snapshot hash; case accepted and completion completed.
Customer delivery	Done picking for 2 plates; valuation quantity -2 and value USD -14; posted stock entry.
Invoice policy	Draft invoice, 38 × 25 = USD 950; tax zero; not posted or paid.
Approved-log correction	Revision 2 approved; original remained approved and linked to its superseding correction.
Separate internal consumption	3 plates consumed; cost USD 21; Done internal picking; no linked invoice/bill.

Record setup and preparatory transitions used the Odoo ORM and authenticated JSON-RPC; sign-off confirmation and sale retry were also exercised through the actual UI. Screenshots are browser captures of persisted records. This is scoped runtime evidence, not an automated test-suite pass or proof of every edge case. The [screenshot evidence manifest](#) records assets and observed outcomes without credentials or customer data.

The October 11 OCA screenshots use a separate disposable database with synthetic **Training Pavilion — External Signature, Demo Operator, and Demo External Control Officer** records. The company uses **Certification Only** invoice policy; this is a signature-workflow demonstration, not the earlier monetary valuation example. The report is rendered by Odoo, and invitation creation, anonymous portal signing, and PMIS acceptance were exercised through the actual browser UI. No material delivery or invoicing is demonstrated by this addendum. Cron was disabled, and email delivery was not tested. See the [OCA screenshot evidence](#).

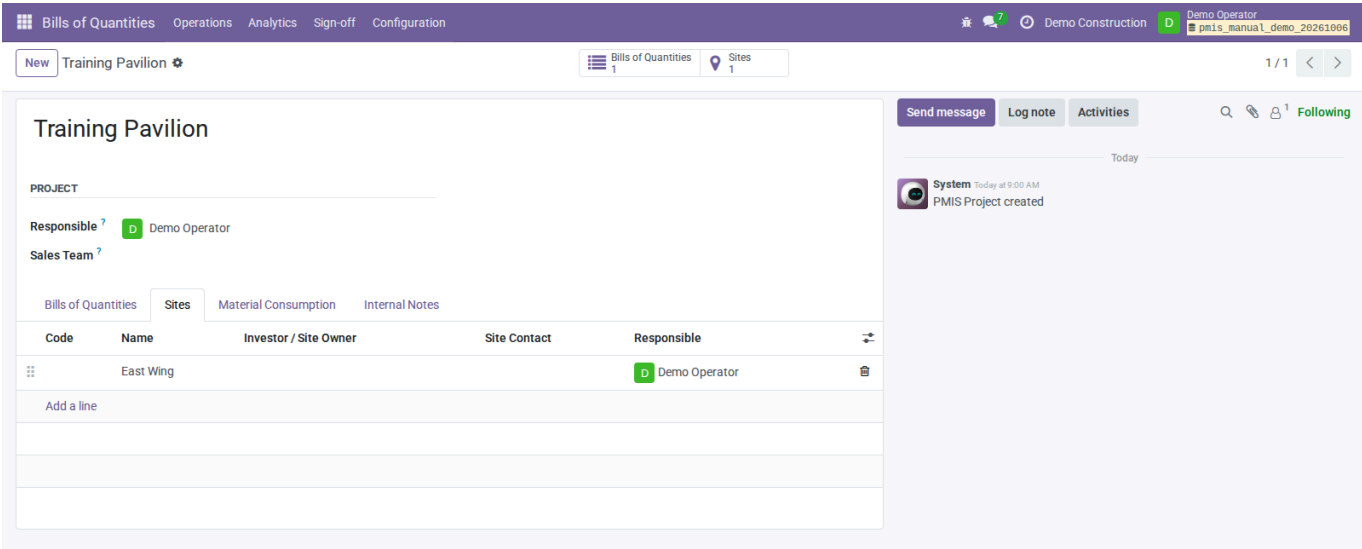
1. Define project scope

- 1. Open **Bills of Quantities** → **Operations** → **Projects**. Create **Training Pavilion** with company and responsible user. Remove the default current-user project filter if another responsible person's project is missing.
- 2. Create **East Wing** under the project or **Analytics** → **Sites**. Set responsibility and applicable stock overrides.
- 3. Use the project's **Bills of Quantities** smart button. Create a same-company BoQ, select **Sale / Outside**, and set the customer.
- 4. Add the service BoQ Item, section, description, unit, planned quantity 100, and unit price 25.
- 5. If needed, use the sale creation wizard to select items/sections and create a draft quotation. Confirm through normal Sales.

Alternatively, use **Convert to Bill of Quantities** on a CRM Opportunity; a Lead must first become an Opportunity. Existing sale orders can use **Create Bill of Quantities**, with project assignment, when they share company/commercial customer and are not already linked to a BoQ.

Compatible item dependencies can consolidate into one commercial response line. The wizard checks demand, company, section, product, unit, and common sale price or purchase cost. Use standard quantity/unit-price mode for this example.

Checkpoint: planned scope exists; creating it does not create accepted work, Situation stock delivery, or a Situation invoice.



Training Pavilion with its East Wing site

Bills of Quantities |
 Operations |
 Analytics |
 Sign-off |
 Configuration

New

BoQ Items
#10: Panel installation — East Wing ⚙️

1 / 1
<
>

☆☆☆☆☆ Panel installation — East Wing

Section ?

Assigned to ? Demo Operator

Dependencies ?

QUANTITY FLOW		VALUE FLOW	
Product ?	Panel Installation Service	Sales Plan Value ?	\$ 2,500.00
Planned Qty ?	100.00 m²	Plan Cost ?	\$ 1,200.00
Sales Order Qty ?	0.00 m²	Sales Order Value ?	0.00
Sales Delivered Qty ?	0.00 m²	Sales Order Cost ?	\$ 0.00
Sales Plan Price ?	\$ 25.00	Sales Delivered Value ?	0.00
Plan Unit Cost ?	\$ 12.00	Sales Delivered Cost ?	\$ 0.00
Sales Order Price ?	\$ 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

Send message

Log note

Activities

Today

D

Demo Operator Today at 9:05 AM
 • System → **Demo Operator** (Assigned to)

System Today at 9:00 AM
 BoQ Item created

SPECIFICATION

PROPOSED SOLUTION

2. Record daily activity

Field Service

Dashboard

Operations

Master Data

Reporting

7

Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Orders

FO001

Daily Logs

1

1 / 1

<

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Create Daily Log

Complete

Cancel Order

New

Completed

...

Send message

Log note

Activities

Search

0

Follow

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...

Planning

Instructions

Execution

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

Today

System

Today at 9:00 AM

Field Service Order created

Field Service order with PMIS project/site context and the Create Daily Log action

Checkpoint: approval locks business content, child evidence, and attachments. It has not created measured/certified quantities, stock moves, or invoices.

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

Construction Daily LogsGDN/26/00001Attachments01 / 1

Create CorrectionDraftSubmittedReviewedApproved

GDN/26/00001

Date10/06/2026

PMIS ProjectTraining Pavilion

PMIS SiteEast Wing

Contractor

Investor

Field Service OrderF0001

FSM LocationTraining Pavilion – East Wing

FSM TeamDefault Team

Assigned FSM Person

Assigned FSM Persons

Responsible PersonDemo Operator

SITE CONDITIONS

WeatherClear

Temperature18 °C

Site ConditionsEast Wing accessible; working area secured.

Work Start

Work End

Downtime Hours0.00

Downtime Reason

Narrative

Diary Entries

Personnel

Machinery and Equipment

Material Evidence

Review and Correction

Planned ActivitiesInstall 40 m² of panels in the East Wing.

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

Instructions and Notices

Supervision Findings38 m² ready for acceptance; 2 m² require finishing.

Inspections and Tests

Deviations and Incidents

Safety and Quality RecordsWork area isolated; no incidents in this training scenario.

Corrective Measures

Send message

Log note

Activities

Today

Demo Operator

ReviewedApproved (State)

Demo Operator

SubmittedReviewed (State)

Demo Operator

DraftSubmitted (State)

Demo Operator

PMIS Construction Daily Log created

Approved daily log: the narrative is retained and approval is visible in the state bar

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

Construction Daily LogsGDN/26/00001Attachments01 / 1

Create CorrectionDraftSubmittedReviewedApproved

GDN/26/00001

Date10/06/2026

PMIS ProjectTraining Pavilion

PMIS SiteEast Wing

Contractor

Investor

Field Service OrderF0001

FSM LocationTraining Pavilion – East Wing

FSM TeamDefault Team

Assigned FSM Person

Assigned FSM Persons

Responsible PersonDemo Operator

SITE CONDITIONS

WeatherClear

Temperature18 °C

Site ConditionsEast Wing accessible; working area secured.

Work Start

Work End

Downtime Hours0.00

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.

Send message

Log note

Activities

Today

Demo Operator

ReviewedApproved (State)

Demo Operator

SubmittedReviewed (State)

Demo Operator

DraftSubmitted (State)

Demo Operator

PMIS Construction Daily Log created

Daily-log material evidence records two plates as information, not as an inventory transaction

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3. Measure and issue work

1. Open **Bills of Quantities** → **Analytics** → **Measurements** → **Measurement Books**.
2. Create a book for the BoQ, project/site, period, responsible operator, and Control Officer.
3. Review the active draft iteration. Initial measured/accepted quantities default to remaining planned scope, not actual daily work. Replace them with measured **40** and accepted **38**. Changing measured quantity in the form defaults accepted quantity to the same value; set the final accepted value afterward.
4. Enter basis, calculation, drawing reference, and notes. **Update Lines from Bill of Quantities** adds missing items without overwriting existing draft quantities.
5. Use **Submit**, then **Financial Sign-off** as a responsible Measurement Operator.
6. On the case, use **Prepare for Sign-off**, then **Send for Sign-off**.
7. The authorized Control Officer opens **Bills of Quantities** → **Sign-off** → **Pending Sign-offs**, reviews evidence, uses **Record Sign-off**, and confirms a positive outcome.

If the assigned Control Officer has no active internal account, use the [OCA PDF/portal option](#) instead of step 7. The requesting internal operator needs **PMIS Valuation Manager** permissions for Measurement Book issuance; the external signature grants none.

The screenshot displays the PMIS Measurement Book creation interface. The top navigation bar includes 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. The main form is titled 'New Measurement Books KOI/26/00001'. The 'Draft' tab is active, showing a table with one iteration (Iteration 1) in a 'Draft' state. The right sidebar shows a system message: 'Measurement Book created'.

Sequence	Reference	Name	State	Iteration S...	Iteration E...	Issue Datetime	Situation...
1	KOI/26/00001/001	Iteration 1	Draft				0

Draft Measurement Book with its project, site, responsible operator, and Control Officer

Use **Open Active Iteration** or the **Measurement Lines** tab to enter quantities; the initial book overview opens on **Iterations**, not on the quantity editor.

Sign-off Cases
SOF/26/00001

Record Sign-off Cancel Draft Prepared **Awaiting Sign-offs** Accepted Returned Rejected Completion Error

Name ?
SOF/26/00001

TARGET SIGN-OFF WORKFLOW

Target Display Name ? KOI/26/00001
Target Model ? pmls.measurement
Target Res ? 1
Document Revision ? 1

Sign-offs Technical / Audit Evidence

CURRENT SIGN-OFF

Current Sign-off Step ? Measurement Book
Current Role ? Control Officer
Pending Reviewers ? Demo Control Officer
Completed Sign-offs ? 0
Required Steps ? 1

Record Sign-off

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 ?

Confirm Sign-off Cancel

Signed Datetime	Workflow Step	Role Code	Outcome	Signer Name	Reason

Today

Demo Operator Today at 9:05 AM
• Prepared → Awaiting Sign-offs (State)
Demo Operator Today at 9:05 AM
Sign-off case moved to review.

Authenticated Control Officer reviews the measurement declaration before Confirm Sign-off

Checkpoint: completion accepts the book, issues the iteration, retains line/PDF snapshots, and creates the next empty draft iteration. Issued pages are eligible for Situation certification. Direct issuance is blocked; completion must use sign-off.

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

7

Demo Construction

D

Demo Operator

pmis_manual_demo_20261006

New

Measurement Book Iterations

Iteration 1

Situations

0

1 / 1

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Print Draft / Record

Open Issued PDF

Draft

Issued

Send message

Log note

Activities

1

0

Follow

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 Lines

Issued Snapshot

Issued Evidence

Situations

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

D

Demo Control Officer

Today at 9:05 AM

• Draft → Issued (State)

D

Demo Control Officer

Today at 9:05 AM

Measurement Book Iteration issued.

System

Today at 9:00 AM

Measurement Book Iteration created

Issued iteration retains 40 m² measured, 38 m² accepted, and 62 m² remaining

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

0

Demo Construction

D

Demo Operator

pmis_manual_demo_20261006

New

Measurement Book Iterations

Iteration 1

Situations

1

1 / 1

<

>

Print Draft / Record

Open Issued PDF

Draft

Issued

Send message

Log note

Activities

1

0

Follow

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 Lines

Issued Snapshot

Issued Evidence

Situations

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

D

Demo Control Officer

Today at 9:05 AM

• Draft → Issued (State)

D

Demo Control Officer

Today at 9:05 AM

Measurement Book Iteration issued.

System

Today at 9:00 AM

Measurement Book Iteration created

Issued Snapshot contains retained measurement pages and accepted values

An overrun needs a qualifying accepted variation. The next draft's existence does not itself establish a repeat-period editing/submission workflow for an accepted book; that interaction needs demo verification. Use a new Measurement Book for the next period in this guide.

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4. Prepare a temporary sale Situation

1. Open **Bills of Quantities** → **Analytics** → **Valuation** → **Situations**.
2. Create a **Temporary** Situation for the same sale BoQ/company/project/site. Set period, issue date, Responsible, and Control Officer.
3. Use **Generate Lines** to link eligible issued measurements and their iterations.
4. Verify current certified quantity **38**, price **25**, and value **950**. Contractual work quantities derive from linked accepted measurements.
5. Classify every included work line and accepted variation line:
 - **Material delivery applies:** select **Delivery Material**, compatible **Delivery Material Unit**, and positive **Delivery Material Quantity**. Enter 2 Demo Mounting Plates for the example.
 - **No material applies:** clear delivery product/unit/quantity. Enter a useful **No Material Reason**; the code does not currently require the reason.
6. Resolve draft variations before submission; only accepted variations feed invoice lines. This guide does not define a variation acceptance route.
7. Use **Submit**, then **Certification Sign-off** as a responsible Situation Operator.
8. On the case, use **Prepare for Sign-off**, then **Send for Sign-off**.

Checkpoint: the immutable canonical manifest includes explicit material classification and mapping. The retained PDF shows certification values, but the current report does not print the material mapping. Review the Situation Lines and **Technical / Audit Evidence** → **Canonical Manifest** as well as the PDF. Unclassified included lines block preparation. Submission alone moves no stock and posts no accounting entries.

The screenshot shows the PMIS software interface. The top navigation bar includes 'Bills of Quantities', 'Operations', 'Analytics', 'Sign-off', and 'Configuration'. The user is logged in as 'Demo Operator' with the session ID 'pmis_manual_demo_20261006'. The main content area is titled 'New Situations SIT/26/00001'. It displays various fields for the situation, including '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). Below these fields, there are sections for 'REPRESENTATIVES' (Our Authorised Representative, Control Officer, Investor Representative) and a table of 'Situation Lines'. The table has columns for 'Delivery M...', 'No Materi...', 'Delivery M...', 'Delivery M...', 'Delivery Mat...', 'Reserved De...', 'Delivered an...', 'Net Delivered ...', 'Price Unit', and 'Current Certifi...'. The first row shows 'Material de...' with a quantity of 2.00, a price of 25.00, and a value of 950.00. On the right side, there is a sidebar with 'Send message', 'Log note', and 'Activities' tabs. The 'Activities' tab is active, showing a list of events with green 'D' icons and timestamps, such as 'Demo Operator Today at 9:10 AM' and 'Demo Operator Today at 9:08 AM'.

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

Situation material columns show an explicit mapping to two mounting plates, separate from service price and certified value

The Situation Lines table is wider than the form. Scroll it horizontally to see the material classification/product/unit/quantity fields, then review **Totals**. The material screenshot shows the completed record: delivered quantity **2** and net material cost **14** are results, not values to type during preparation.

Bills of Quantities |
 Operations |
 Analytics |
 Sign-off |
 Configuration

 8 |
 Demo Construction |
 D 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

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

Situation Totals show certified value USD 950 and remaining value USD 1550

A measurement line cannot appear in multiple non-cancelled Situations. **Generate Lines** filters by BoQ/company and by site when specified; it does not filter by Situation period dates. Review the actual measurement selection for the period.

5. Sign and complete the Situation

Direct signature

The authorized internal Control Officer opens the pending case, reviews the Situation and declaration, uses **Record Sign-off**, selects an outcome, and uses **Confirm Sign-off**.

Accepted and **Accepted with Reservations** are positive. Reservations, returns, and rejections require a reason. Active steps execute sequentially; all must have positive outcomes for completion. Reservations do not pause stock delivery; the final positive step attempts completion.

Represented Situation signature

An authorized internal presenter chooses **In-person Device Signature** or **Uploaded Paper Signature**, captures the signature or uploads the primary signed paper in the current wizard, and supplies actor attestation. Supporting evidence is optional. Unknown original paper-signature datetime/timezone remain empty; a supplied

The record distinguishes signer from authenticated presenter. The supplied Measurement Book adapter uses authenticated signing, not this represented route.

This option applies to both Measurement Book financial sign-off and temporary sale Situation certification. Use it when the assigned **Control Officer** is an active contact with no active internal Odoo user. A portal user still qualifies; the email invitation also works for a contact without any Odoo account.

- SOF/26/00002

1 / 1

Record Sign-offSend Control Officer SignatureCancel

DraftPreparedAwaiting Sign-offsAcceptedReturnedRejectedCompletion Error

NameSOF/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 Pavilion – External Signature
Pmis Site

Prepared Datetime10/11/2026 05:53:55
Accepted Datetime
Signature StatusUnsigned
Completion StatusNot Started

Sign-offsTechnical / Audit EvidenceCompletion

CURRENT SIGN-OFF

Current Sign-off StepTemporary Situation Certification Sign-off / 10 / Control Officer
Current RoleControl Officer
Pending Reviewers
Completed Sign-offs0
Required Steps1

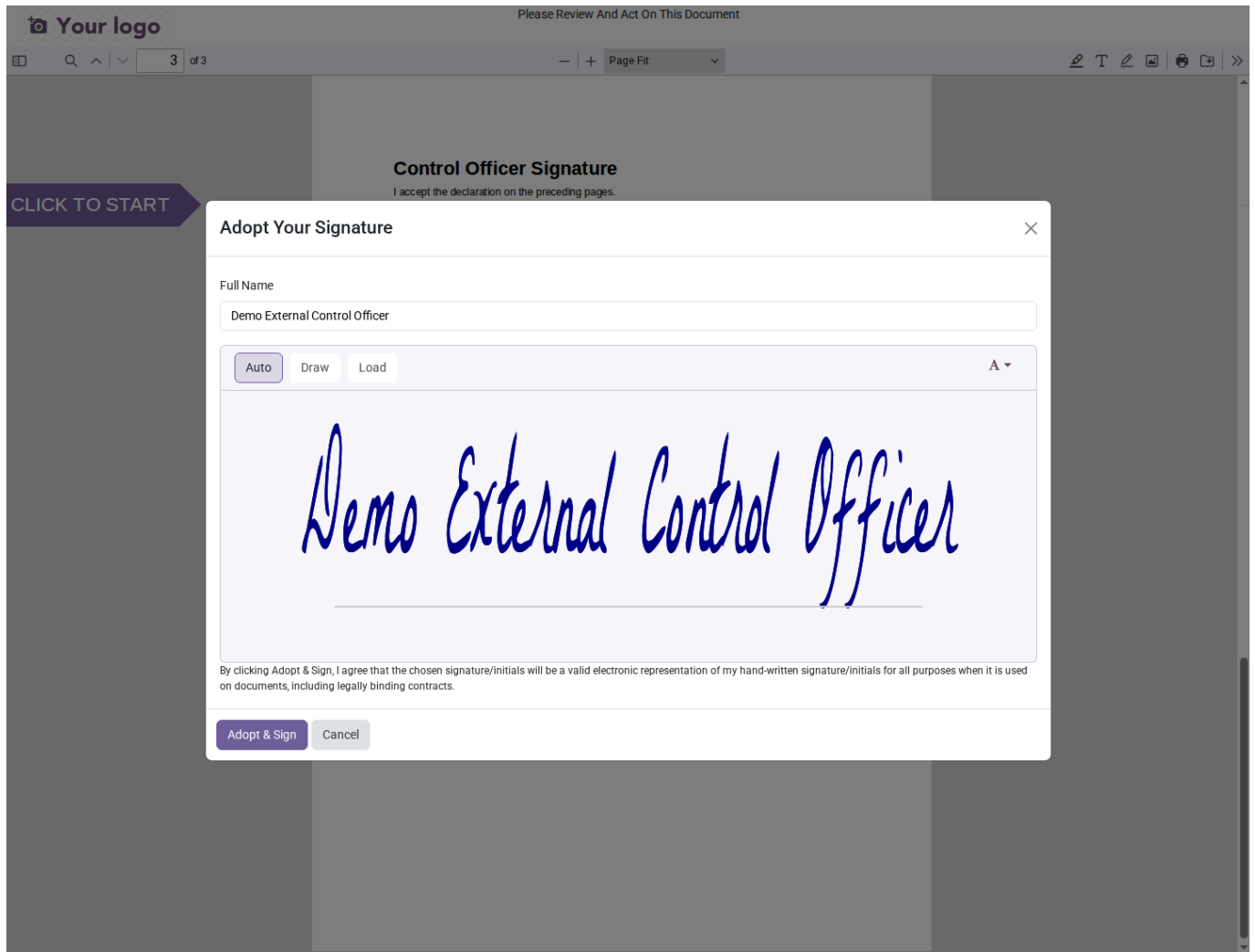
Signed Datetime	Workflow Step	Role Code	Outcome	Signer Name	Reason

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The case-created OCA request is Sent and names the external contact as its recipient

I accept the declaration on the preceding pages.

21 / 37



OCA's actual Adopt Your Signature dialog identifies the synthetic external Control Officer

Use **Adopt & Sign** in the signature dialog, then **Validate & Send document** in the portal. Check that the declaration checkbox is selected before submitting. The dialog's standard legal wording does not establish qualified-signature compliance.



Please Review And Act On This Document

3 of 3

Page Fit



CLICK TO START

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

☒



Validate & Send document

The declaration checkbox is selected, the signature is captured, and Validate & Send document is available

The external sign-off identifies the assigned contact, not an authenticated internal signer or presenter. The invitation grants access to this signing PDF, not the PMIS case or business document. Internal users keep the existing direct signature workflow; this portal route records acceptance, not reservations, returns, or rejection.

After portal signing, the PMIS case is Accepted with Signed signature status and Completed completion status

3

Demo Construction

D

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

1 / 1

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

Case

SOF/26/00002

Workflow Step

Temporary Situation Certification Sign-off / 10 / Control Officer

Role Code

Control Officer

Outcome

Accepted

Reason

Signing Mode

OCA PDF / Portal Signature

Authenticated Signer

Signer Partner

Demo External Control Officer

Odoo Evidence Actor

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.

The immutable sign-off records OCA PDF / Portal Signature, the external contact, and separate original and signed PDFs without an internal signer or presenter

Completion permissions: completion runs with the requesting operator's current internal permissions. Measurement Book issuance needs **PMIS Valuation Manager** access. Situation delivery/invoicing needs the applicable internal permissions and configuration. A completion error does not discard the signature or signed PDF; the authorized internal responsible can retry without another signature.

Revocation and replacement: an unsigned invitation is rejected if its officer, document, declaration, current step, or internal requester's eligibility changes, or if the invitation/case is cancelled. An authorized operator can cancel an unsigned OCA invitation and send a replacement; this does not cancel the PMIS case. A recorded signature cannot be cancelled as an invitation.

Use the case button: an ordinary OCA request linked through its **Object** field alone does not count as PMIS approval. Only the case-created, bound request can record this Control Officer outcome. This is not a claim of qualified electronic-signature or statutory compliance.

Completion

After the final positive signature, one atomic attempt:

1. Validates material classification and applicable stock configuration.
2. Creates/reuses the outgoing picking, fully reserves, and validates normal stock operations without a partial-delivery backorder.
3. Verifies valuation and normal posted stock accounting for automated-valuation products.

4. Links signed evidence and accepts the Situation.
5. Applies company invoice policy and completes the case.

Explicitly no-material Situations skip delivery. Measurement Book sign-off, purchase/final Situations, and non-positive outcomes do not trigger customer delivery.

Checkpoint: case **Accepted**, completion completed, and Situation **Accepted** or **Invoiced**. In the material example, picking is Done and valuation verified. Read these separately from signature status.

The screenshot displays the Odoo Sign-off interface. A modal window titled "Record Sign-off" is open, showing details for case "SOF/26/00002". The modal includes fields for Case, Workflow Step, Role Code, Signer User, Signer Name, Signing Mode, Declaration Text, Outcome, and Reason. The "Outcome" is set to "Accepted". The "Signer User" is "Demo Control Officer". The "Declaration Text" is "I confirm that I have reviewed this temporary Situation certification revision and record my sign-off on the prepared immutable Situation evidence." The "Reason" field is empty. The modal has "Confirm Sign-off" and "Cancel" buttons. The background shows the "Sign-off Cases" list with columns for Name, Target, Current Sign-off Step, Current Role, Pending Reviewers, Completed Sign-offs, and Required Steps. The "Sign-off" button is highlighted in the top navigation bar.

Control Officer confirms the Situation declaration as an authenticated Odoo user

6. Review costs and invoices

The screenshot shows the Odoo Sign-off Cases interface. 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 of 'pmis_manual_demo_20261006'. The case name is 'SOF/26/00002'.

The main content area is divided into two sections: 'TARGET' and 'SIGN-OFF WORKFLOW'. The 'TARGET' section includes fields for 'Target Display Name', 'Target Model', 'Target Res', and 'Document Revision'. The 'SIGN-OFF WORKFLOW' section includes fields for 'Workflow', 'Pmis Project', 'Pmis Site', 'Prepared Datetime', 'Accepted Datetime', 'Signature Status', and 'Completion Status'.

Below these sections are tabs for 'Sign-offs', 'Technical / Audit Evidence', and 'Completion'. The 'Sign-offs' tab is active, showing a 'CURRENT SIGN-OFF' section with fields for 'Current Sign-off Step', 'Current Role', 'Pending Reviewers', 'Completed Sign-offs', and 'Required Steps'. A table below this section lists sign-off steps with columns for 'Signed Datetime', 'Workflow Step', 'Role Code', 'Outcome', 'Signer Name', and 'Reason'.

The right-hand pane displays a timeline of activities and messages. It includes a 'Send message' button, a 'Log note' button, and an 'Activities' button. The timeline shows a series of events, including 'Completion Error' (Accepted), 'Signed target delivery and accounting completed', 'To-Do done: Complete Signed Situation', 'Original note', 'Feedback', 'Internal completion retry requested', 'Awaiting Sign-offs' (Completion Error), 'Sign-off record recorded', 'Sign-off target completion failed', 'Sign-off case moved to review', 'Draft' (Prepared), 'Sign-off record prepared', 'Sign-off case created', and 'PMIS Sign-off Case created'.

Accepted sign-off case separates Signed signature status from Completed completion status

Open **Delivery and Actual Cost**. Review picking, delivery state, operation attribution, gross cost, returned value, net cost, valuation, stock accounting, and invoice/payment states. The configured responsible is assigned to the picking; operation attribution fields retain the actor who triggered execution.

Event	Inventory	Accounting
Submission/preparation	None	None
Completed material delivery	Done moves and normal valuation layers	Automated valuation posts normal stock entries; manual valuation creates no automatic stock journal entry.
Draft invoice	No repeated delivery	No posted receivable/revenue/tax entry.
Posted invoice	No repeated Situation delivery	Normal receivable/revenue/applicable tax entry.
Payment	None	Separate payment/reconciliation.
Stock return	Normal linked return/valuation	Normal stock reversal where applicable.
Credit note	No stock return by itself	Separate invoice reversal.

Observed delivery cost **USD 14** differs from Situation value **USD 950** before taxes. The demo's automated stock entry has debit and credit totals of USD 14; accounts depend on Odoo configuration. The customer invoice remains a separate draft document.

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

6Demo ConstructionDpmis_manual_demo_20261006

NewSituationsSIT/26/00001

Signed Situation SnapshotSIT/26/00001-signoff.pdfRevision1Measurement Book Iterations1

REPRESENTATIVESOur Authorized RepresentativeControl OfficerDemo Control OfficerInvestor 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 messageLog noteActivities

Today

Demo OperatorToday at 9:10 AM

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

Demo OperatorToday at 9:10 AMSituation accepted; draft invoice Draft Invoice prepared.

Demo OperatorToday at 9:10 AMCustomer-facing Situation certification completed.

Demo OperatorToday at 9:10 AMCustomer delivery, stock valuation, and stock accounting verified.

Demo OperatorToday at 9:08 AM

- Draft → Submitted (State)

Demo OperatorToday at 9:08 AMPMIS Situation created

Delivery and Actual Cost shows delivered material, verified valuation, posted stock accounting, and a draft invoice

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

6Demo ConstructionDpmis_manual_demo_20261006

NewAll TransfersWH/OUT/00002

MovesValuation

PrintReturn

DraftWaitingReadyDone

☆ WH/OUT/00002

Delivery AddressDemo CustomerScheduled Date10/06/2026 09:10:14

Operation TypeDemo Construction: Delivery OrdersEffective Date10/06/2026 09:10:14

Source DocumentSIT/26/00001

OperationsAdditional InfoNote

Product	Demand	Quantity
Demo Mounting Plate	2.00	2.00

Send messageLog noteActivities

Today

Demo OperatorToday at 9:10 AMTransfer created

Done customer delivery picking contains two mounting plates

DMST/2026/10/0002

Reference ? WH/OUT/00002 - Demo Mounting Plate Accounting Date ? 10/06/2026

Other Info

Auto-post ? No Fiscal Position ?

Checked ? ☒

Add an internal note...

Today

D Demo Operator Today at 9:10 AM
Journal Entry created

Posted stock entry records USD 14 of inventory value; it is not a customer invoice

Customer Invoice

DMSA/2026/00001

Customer ? Demo Customer Invoice Date ? 10/06/2026

Due Date ? 10/06/2026 or Payment Terms

Invoice Lines Other Info

Product	Quantity	Price	Taxes	Amount
Panel Installation Service Panel installation -- East Wing	38.00	25.00		\$ 950.00

Add a line Add a section Add a note Catalog

Terms and Conditions

Untaxed Amount: \$ 950.00
Total: \$ 950.00

Today

D Demo Operator Today at 9:10 AM
Invoice Created

Unposted customer invoice contains 38 m² at USD 25, totaling USD 950 with zero taxes

With **Prepare draft invoice**, the linked invoice remains unposted. An authorized accounting user can use **Post Invoice** after acceptance. **Prepare Draft Invoice** can also run before acceptance; preparation neither certifies nor posts, and later preparation can rebuild draft lines. Review the actual invoice and taxes before posting.

Alternative: internal purchase consumption

This separate route uses **Purchase / Inside** scope and Operations-confirmed material; it is not another automatic step after customer sale delivery.

1. Prepare a purchase BoQ with vendor/storable material items. An optional purchase response creates an RFQ; confirmation/receipt use normal Purchase/Inventory.
2. Create a purchase Situation with material lines/units and enter positive **Internal Confirmed Quantity** on applicable lines.
3. Submit; as the responsible project/site Operations Manager with Stock User access, use **Confirm Material Consumption**.

- 4. Review **Material Consumption** and its internal-to-production picking. Available untracked material validates automatically; unavailable/tracked material remains pending for normal warehouse processing.
- 5. Use **Retry Stock Completion** for available untracked material, or normal lot/serial allocation and picking validation for tracked stock.

Checkpoint: actual consumption/cost comes from Done moves and valuation layers. Pending quantities are not actual consumption. Operations confirmation does not require customer certification. These addons provide no purchase Situation customer-certification or automatic vendor-bill creation route.

The separate demo purchase Situation consumes **3 plates** at standard cost **USD 7**, giving **USD 21**. It remains **Submitted** after operational confirmation; a Done stock operation is not customer certification.

Bills of Quantities

Operations

Analytics

Sign-off

Configuration

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Demo Construction

Demo Operator

pmis_manual_demo_20261006

New

Situations

SIT/26/00002

1 / 1

<

>

Combined Actual Material Cost ?

21.00

Situation Material Delivery ?

Material Delivery Status ?

Not Applicable

Completion Requested By ?

Automated Completion User ?

Delivery Requested At ?

Invoice Status ?

Not Prepared

PMIS Sign-off Case ?

Signed Situation Snapshot ?

Revision ?

1

Measurement Book Iterations ?

REPRESENTATIVES

Our Authorised Representative ?

Control Officer ?

Investor Representative ?

Situation Lines

Totals

Material Consumption

Certification Sign-off

Material Consumption ?

WH/INT/00001

Material Consumption Status ?

Fully Consumed

Combined Actual Material Cost ?

21.00

Send message

Log note

Activities

Today

Demo Operator

Today at 9:12 AM

Internal operational confirmation completed; stock consumption validated.

Demo Operator

Today at 9:12 AM

Draft → Submitted (State)

Demo Operator

Today at 9:12 AM

PMIS Situation created

Purchase Material Consumption shows Fully Consumed and actual material cost USD 21

Bills of Quantities
Operations
Analytics
Sign-off
Configuration

Demo Construction
Demo Operator
pm19_manual_demo_20261006

New
All Transfers
WH/INT/00001

Moves
Valuation

1 / 1

Print
Return

Draft
Waiting
Ready
Done

Send message
Log note
Activities

Following

☆
WH/INT/00001

Contact ?

Operation Type ?
Demo Construction: Internal Transfers

Scheduled Date ?
10/06/2026 09:12:17

Effective Date ?
10/06/2026 09:12:17

Source Document ?
SIT/26/00002

Operations
Additional Info
Note

Product	Demand	Quantity
Demo Mounting Plate	3.00	3.00

D
Demo Operator
Today at 9:12 AM

D
Demo Operator
Today at 9:12 AM
Transfer created

Done internal picking moves three plates from warehouse stock to the production consumption location

Corrections and recovery

Situation	Action	Retained evidence
Log wrong before approval	Manager rejects with reason; user uses Return to Draft and resubmits.	Rejection reason and incremented revision.
Approved log wrong	Manager enters Correction Reason , uses Create Correction , then submits/reviews/approves the new log.	Original remains locked; supersession occurs on correction approval. Source attachments stay on original.
Book/Situation returned or rejected	Use the document's rejection/draft revision workflow, correct, submit, and create the new revision's case.	Earlier immutable case and sign-offs.
No signer/case access	Check active/internal user, live group, company, project/site authority, matching Control Officer contact, and responsibility.	Existing case/evidence.
Prepared content changed	Resolve revision and fresh evidence/case as applicable before signing.	Earlier immutable evidence.
Positive signature then Completion Error	Correct prerequisites; configured responsible uses Complete Signed Situation or Retry Delivery Completion .	Same signature/revision/hashes; retry creates no new signature.
Consumption pending	Resolve stock/tracking and retry or validate through warehouse.	Existing consumption picking and confirmation attribution.
Returned delivered material	Validate a normal return; handle credit note separately. For a partial return, Retry Delivery Completion delivers only missing net quantity.	Original evidence, moves, and return lineage.

Sale completion failure rolls back partial stock, reservations, valuation, and invoice effects made inside that attempt. The signature remains and the Situation is uncompleted. A pending purchase consumption picking instead stays available.

Demonstrated sale completion retry

The demo Control Officer has signing authority but no Accounting permissions. Their positive signature therefore remains **Signed**, while the draft-invoice precondition produces **Completion Error**. The Situation stays **Submitted**; there is no retained delivery picking or invoice from that failed attempt.

New Sign-off Cases SOF/26/00002 ⚙️

Complete Signed Situation

DraftPreparedAwaiting Sign-offsAcceptedReturnedRejectedCompletion Error

Send message Log note Activities

1 / 1 < >

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

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

Demo Control Officer Today at 9:08 AM

- Awaiting Sign-offs → **Completion Error** (State)

Demo Control Officer Today at 9:08 AM

Sign-off record recorded.

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.

Demo Operator Today at 9:08 AM

- Prepared → **Awaiting Sign-offs** (State)

Demo Operator Today at 9:08 AM

Sign-off case moved to review.

Demo Operator Today at 9:08 AM

- Draft → **Prepared** (State)

Demo Operator Today at 9:08 AM

Sign-off record prepared.

Demo Operator Today at 9:08 AM

Sign-off case created.

Demo Operator Today at 9:08 AM

PMIS Sign-off Case created

Signed case with Completion Error explains the missing invoice-create permission and assigns retry to Demo Operator

Demo Operator, the configured completion responsible with Stock/Accounting permissions, uses **Complete Signed Situation**. Completion succeeds without asking the Control Officer to sign again. The demo verifies one unchanged signature and unchanged content/PDF hashes before and after the retry.

Bills of QuantitiesOperationsAnalyticsSign-offConfiguration

8Demo Constructionpmis_manual_demo_20261006

NewConstruction Daily LogsGDN/26/00002Attachments01 / 1<>

Contractor ?Assigned FSM Person ?

Investor ?Assigned FSM Persons ?

Responsible Person ?Demo Operator

SITE CONDITIONS

Weather ?Clear

Temperature ?18 °C

Site Conditions ?East Wing accessible; working area secured.

Work Start ?

Work End ?

Downtime Hours ?0.00

Downtime Reason ?

NarrativeDiary EntriesPersonnelMachinery and EquipmentMaterial EvidenceReview and Correction

Revision ?2

Reviewed By ?Demo Operator

Reviewed At ?10/06/2026 09:12:10

Approved By ?Demo Operator

Approved At ?10/06/2026 09:12:10

Rejected Reason ?

Correction Reason ?Clarify morning crew hours: 18 hours, not 16. Work quantities unchanged.

Corrects Daily Log ?GDN/26/00001

Corrective Revisions ?

Name	Date	PMIS Project	PMIS Site	Field Service ...	FSM Location	Responsible ...	State

Superseded By ?

Send messageLog noteActivities

Today

Demo OperatorToday at 9:12 AM

Reviewed → Approved (State)

Demo OperatorToday at 9:12 AM

Corrective revision approved for source GDN/26/00001.

Demo OperatorToday at 9:12 AM

Submitted → Reviewed (State)

Demo OperatorToday at 9:12 AM

Draft → Submitted (State)

Demo OperatorToday at 9:12 AM

Created as corrective draft for GDN/26/00001. Reason: Clarify morning crew hours: 18 hours, not 16. Work quantities unchanged.

Demo OperatorToday at 9:12 AM

PMIS Construction Daily Log created

Approved correction identifies revision 2, its original daily log, and the correction reason

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The [media index](#) contains only current PDF deliverables; obsolete portrait, unsigned, and portal-form samples have been removed. Removing repository samples does not alter immutable attachments in business databases.

Report boundaries: retained iteration snapshots captured in the older UI screenshots may display **Draft / Provisional Print** because preparation precedes issuance. The current measurement sample is rendered from the **Issued** record and has explicit iteration dates. The Situation PDF does not print material mapping; that mapping is retained in the canonical manifest. Do not replace immutable business snapshots merely to change presentation labels.

Output	Purpose	Retention
BoQ / BoQ Item / project BoQ reports	Planned scope	Current records; restricted financial values need Program Estimation access.
Construction Daily Log PDF	Daily evidence	Rendered on demand; approval stores no PDF snapshot. Attachment index lists filenames without embedding content.
Measurement Book sign-off PDF	Financial review	Immutable case evidence.
Issued iteration PDF/lines	Accepted measurement pages	Retained issued evidence, separate from subsequent drafts.
Situation PDF/manifest	PDF: certification values; manifest: certification and material mapping	Immutable; invoice does not replace signed document.
Stock picking/moves/valuation/entries	Actual material and cost	Normal records with Situation/line/route traceability.
Invoice/payment	Billing/settlement	Separate Accounting records.

Implementation boundaries

- Supplied customer Situation signing is temporary **sale** only, not final/purchase.
- Logs do not synchronize quantities or create measurements, Situations, stock, invoices, or bills.
- Each Situation line has one explicit material mapping; there is no automatic bill-of-materials explosion.
- Ordinary order fulfillment/invoicing and Situation operations are separate paths; this guide establishes no cross-path automatic deduplication.
- Situation dates do not filter **Generate Lines**; review its measurement links.
- Payments, credit notes, and stock-return creation are separate operations.
- Represented signatures are internal evidence, not portal signing or established qualified electronic-signature/statutory construction-log compliance.
- OCA PDF/portal signing is a separate option for external Control Officers; it also does not establish qualified-signature or statutory compliance. Its October 11 browser demo verifies Situation certification only, not email delivery, Measurement Book issuance, stock valuation, or invoicing.
- Real report rendering and the scoped four-addon demo workflow are verified. Represented signing, shortage/tracking errors, returns, and other edge cases were not exercised. Inspected assertions are not a fresh test pass.
- Issued-iteration PDF labeling and printed Situation material mapping have the presentation limitations described under reports; no application code was changed.

Source map

Repository sources used for this edition; module READMEs provide deeper detail.

Topic	Primary evidence
Scope/responses/navigation	BoQ interface , sale wizard , menus , Assessment README
Measurements	book , lines , iteration , sign-off adapter
Daily evidence/corrections	log , FSM order , material evidence , Field Service README
Signature/completion	case , Situation adapter , Situation link , Sign-off README
External Control Officer portal signing	case invitation , protected OCA request , signature callback , portal access , October 11 screenshots and observations
Stock/cost/returns	Situation stock , stock form , return lineage , Situation Stock README
Invoicing	Situation/lines , company policy , settings
Inspected test assertions (not executed)	daily-log tests : approval/corrections and unchanged commercial counts; Situation case tests : hash checks, failure/retry, presenter authority; delivery tests : cost/posting, unavailable-stock rollback, retry authority/idempotency, partial-return redelivery.

See the companion [tutorial storyboard](#).

TODO

- Video work is paused; record/review the companion tutorial only when resumed.
- Resolve the issued-iteration PDF's provisional label and the absence of printed Situation material mapping in a separately authorized implementation task.
- Exercise stock-shortage/tracking failures, represented signing, and returns before adding screenshots or claiming runtime verification for those variants.
- Confirm exact UI paths for repeat-period books, signed-document supersession, and full-return redelivery before documenting those clicks.