A DESIGN + BUILD CONSTRUCTION COMPANY

AICON ELEVATE

Operations handbook

Role guides and handoffs from first intake to project handover and financial close.

18 role guides · 20 shared workflows

Find your position or look up a workflow. Each guide shows where to open the work, what to verify and what the next person needs.

Find a guide	Find a role, workflow or workspace in the indexes or PDF bookmarks.
Search a term	Use Find in your PDF viewer to look up a task, role or step.
See the workspace	Use the guide's screen link to open the desktop and phone previews.

Training project
Harbor Studio Fit-out · Project, people and transactions are fictional.

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Open workflow index ›
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Shared workflows · 2/2

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Find a workspace · 1/7

Look up the menu path, then select a guide to follow the work.

Dashboard

Dashboard

Scan your role's summaries, then open the underlying item to act.

Get started and find your assignments ›
Review team performance and company targets ›

My Work

My Work

Open assignments, reviews, deadlines and reminders that belong to your active role.

Get started and find your assignments ›
Find your work, set deadlines and request a change ›

My performance

Team › My performance

Review your operational measures, then use My people or Targets where authorized.

Review team performance and company targets ›
Deliver a media brief and check enquiry attribution ›

Tasks and Taskflows

Tasks

Choose a task view, open the work, attach evidence and follow acceptance and verification. For connected work use Taskflows.

Assign tasks, delegate work and verify closure ›
Find your work, set deadlines and request a change ›

Help & Support

Team › Help & Support, or the Help button

Open the handbook or send a private support request with the page, exact error and impact.

Find project files, check access and ask for help ›

My calendar

My calendar

Check dated work and open the source record to see its current status and allowed actions.

Post a team update, reply and find notifications ›
Find your work, set deadlines and request a change ›

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Find a workspace · 2/7

Look up the menu path, then select a guide to follow the work.

Team wall

Team wall

Share team updates, reply on a post and open relevant notifications.

Post a team update, reply and find notifications ›
Deliver a media brief and check enquiry attribution ›

My profile

Team › My profile

Review your name, contact details and qualifications. Use the profile or HR workflow for the field you need.

Get started and find your assignments ›
Set up and use appointed HR access ›

My job roles

Team › My job roles

Read the duties attached to a role offer and accept or decline it on your own account.

Get started and find your assignments ›
Invite staff and review access ›

Role descriptions

Team › Role descriptions

Read the current responsibilities and approval expectations attached to a role.

Get started and find your assignments ›
Invite staff and review access ›

Staff HR

Team › Staff HR

Access your own HR work, or the staff register, policies and cases within a scoped appointment.

Set up and use appointed HR access ›
Request leave or correct a staff attendance record ›

Leads

Project setup › Leads

Follow referral, assignment, meeting, qualification and the signed Design Service Agreement.

Confirm the client meeting and notify the architect ›
Accept a lead and prepare its design handoff ›

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Find a workspace · 3/7

Look up the menu path, then select a guide to follow the work.

Projects

Project setup › Projects

Open a project and check its current team, roles, prestart requirements and operating status.

Clear prestart and oversee site delivery ›
Clear permits and start construction ›

Plans & design

Design & planning › Plans & design

Assign design work, track programme and stage actions, and check drawings, changes and review feedback.

Assign design work to an architect or discipline owner ›
Review or return a design programme ›

Design packages

Design & planning › Design packages

Exchange the specific files and deliverables needed for design or estimating with the permitted recipients.

Share a design package or route a design change ›
Carry the signed TOR through to issued drawings ›

Estimates

Design & planning › Estimates

Build quantities, approved resource costs and scope assumptions. Prepare the correct Final estimate revision for review.

Build and submit a Final estimate ›
Approve the estimate and turn it into a working programme ›

Estimate & plan approvals

Design & planning › Estimate & plan approvals

Review the exact submitted Final estimate or initial construction plan and its prior decisions.

Approve the estimate and turn it into a working programme ›
Build and submit a Final estimate ›

Budget & contract

Design & planning › Budget & contract

Check the priced proposal, client answer, signed build contract and authorized scope changes.

Approve the estimate and turn it into a working programme ›
Route variations and explain cost overruns ›

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Find a workspace · 4/7

Look up the menu path, then select a guide to follow the work.

Permits

Design & planning › Permits

Track applications, issuance, sign-and-seal, inspections and any formally approved exemption.

Clear permits and start construction ›
Review a concrete pouring request ›

Program of works

Design & planning › Program of works

Review the baseline, current progress, Gantt forecast and impact on materials, labor and equipment.

Propose a change to the working Gantt ›
Approve the estimate and turn it into a working programme ›

Site reports

Site delivery › Site reports

Record daily work, progress and evidence. Follow submitted or returned reports and weekly summaries.

Submit a daily report from the site ›
Clear prestart and oversee site delivery ›

Concrete pouring

Site delivery › Concrete pouring

Send the pour request with scope and evidence, then follow technical review, approval and actual completion.

Review a concrete pouring request ›
Clear permits and start construction ›

Materials

Site delivery › Materials

Start from a project scope item, then request, order, count the delivery, and issue from stock when appropriate.

Request materials, workers or subcontracted work ›
Canvass and issue a purchase order ›

Equipment

Site delivery › Equipment

Start with a project equipment need, check available units or rentals, and track delivery, return and settlement.

Assign equipment, hire from a supplier and record return ›
Request materials, workers or subcontracted work ›

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Find a workspace · 5/7

Look up the menu path, then select a guide to follow the work.

Manpower

Site delivery › Manpower

Plan manpower, verify time records where needed, and use the appropriate payroll or subcontract billing route.

Mark site crew attendance and prepare weekly payroll ›
Request materials, workers or subcontracted work ›

Close-out

Site delivery › Close-out

Track punch items, handover evidence, warranty callbacks and the final account.

Verify punch items, hand over and close the project ›
Review a lead, agreement and close-out ›

Client billing

Finance › Client billing

Record billings and client collections against the approved contract, period and supporting evidence.

Send progress billing and record collections ›
Review held entries and hand off journals ›

Payments

Finance › Payments

Prepare or review supplier payment, advances, petty cash and liquidation in their own records.

Match, approve and release a supplier payment ›
Verify supplier advance VAT evidence ›

Accounting

Finance › Accounting

Review journal sources, approved treatment, held entries, reconciliation and internal period reports.

Review held entries and hand off journals ›
Verify supplier advance VAT evidence ›

Contingency

Finance › Contingency

Open the project reserve and follow the reserve, draw and release trail.

Route variations and explain cost overruns ›
Verify supplier advance VAT evidence ›

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Find a workspace · 6/7

Look up the menu path, then select a guide to follow the work.

DUPA library

Libraries › DUPA library

Find approved unit price analyses used to build an estimate and confirm the scope and units.

Build and submit a Final estimate ›
Request a new library item and review it for publication ›

Resource catalogue

Libraries › Resource catalogue

Find approved materials, labor and equipment resources, rates and units before building estimate quantities.

Build and submit a Final estimate ›
Request a new library item and review it for publication ›

Workbook library

Libraries › Workbook library

Look up approved workbook references and check what is ready to use.

Build and submit a Final estimate ›
Request a new library item and review it for publication ›

Library requests

Libraries › Library requests

Propose a material, labor, equipment item or DUPA, then follow review and decision status.

Request a new library item and review it for publication ›
Build and submit a Final estimate ›

Company settings

Administration › Company settings

Find the supported company defaults and check their effect before using authorized changes.

Invite staff and review access ›

Budget standards

Administration › Budget standards

Find the approved standards and versioned defaults used by estimating.

Invite staff and review access ›
Build and submit a Final estimate ›

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Find a workspace · 7/7

Look up the menu path, then select a guide to follow the work.

Users & access

Administration › Users & access

Create invitations, review registrations, manage technical access and send role offers.

Invite staff and review access ›
Get started and find your assignments ›

Activity log

Administration › Activity log

Trace visible actions by time and actor and open the source for the complete workflow history.

Invite staff and review access ›
Find project files, check access and ask for help ›

Sign-in, registration and Foyer

Sign-in › Register / Foyer

Register with your invitation, complete onboarding and finish required steps while access is pending.

Get started and find your assignments ›
Invite staff and review access ›

Files and offline work

Inside the project or workflow record

Preview and download permitted evidence from its source. Reopen cached drafts or outbox items from the same account when offline.

Find project files, check access and ask for help ›
Submit a daily report from the site ›

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TEAM MEMBER

Get started and find your assignments

Finish onboarding, answer job-role offers and open the work waiting for you.

The Foyer › My job roles › My Work

Workspace screens · 50

What to do

1. **Sign in with your own account**
   If you received an invitation, use Register with an invitation. Follow the steps in the Foyer and complete any required profile details.
2. **Read and answer your job-role offers**
   Open My job roles and read the duties before accepting. A project role can also require a separate assignment from the project team.
3. **Open My Work each day**
   Start with the assignment, review or reminder waiting for you. Check its deadline and open the record to see the action. Use Help & Support if you cannot find an expected item.

Handoff

Administrator or role lead › Team Member

A named invitation or job-role offer and the project assignment, where required.

Common questions

Why can I see an assignment in the calendar but cannot act on it?

The calendar helps you see scheduled work. The assignment and the record’s permissions determine who can take action.

ADMINISTRATOR

Invite staff and review access

Bring named staff into Elevate and confirm their account access before work reaches them.

Administration › Users & access › Registrations

Workspace screens · 51

What to do

1. **Create an invitation**
   Under Registrations, select Generate invitation. Add an optional label and share the 24-hour code with the intended person so they can register.
2. **Review the registration**
   Check the application and the HR hiring record. Select the appropriate job-role offers and choose Approve & offer roles. Account access level is managed separately.
3. **Check the effect of an access change**
   Before removing an account, review its project assignments and any waiting step that could lose its last role holder. Follow up with the managers responsible for replacements.

Handoff

Administrator › Team Member and operational role lead

A reviewed registration, correct account access and named project or duty follow-up where needed.

Common questions

Can an Administrator approve a project or accounting entry?

Use the authorized operational Team Member account and its assigned duty. Administrator access is for system management and permitted oversight.

HR OFFICER

Set up and use appointed HR access

Confirm which people and actions your HR appointment covers before opening private records.

Staff HR › People / Policies & setup

Workspace screens · 52

What to do

1. **Accept the HR Officer offer**
   Complete the Foyer and read the HR Officer duties under My job roles.
2. **Have your identity and appointment confirmed**
   A Managing Officer links the verified staff identity and proposes an appointment with dates, scope and capabilities. An independent Managing Officer approves it.
3. **Work inside the assigned scope**
   Open Staff HR and use the available People or Policies & setup actions. Check the authority and source evidence before handling a record or proposing a policy version.

Handoff
Proposing Managing Officer and independent Managing Officer › Appointed HR Officer
A dated and approved appointment tied to the verified staff record, with the permitted actions and staff scope.

Common questions

Does accepting the HR role unlock staff records?
Private HR actions require the separately approved appointment and its applicable capabilities.

SALES MANAGER

Confirm the client meeting and notify the architect

Use the architect's availability and the saved client contact to book one agreed meeting.

Leads › Client coordination

Workspace screens · 53

What to do

1. **Open the lead's Client coordination**
   Check that you are the assigned Sales Manager. The architect first accepts the assignment and offers at least two available times.
2. **Confirm the slot with the client**
   Use the contact information saved on the lead. Record the agreed time, meeting venue or link, and the confirmation channel.
3. **Check the handoff**
   The confirmed meeting becomes a client contact and appears for the participants. The Architect-in-Charge receives the work and records the actual meeting outcome.

Handoff

Sales Manager › Architect-in-Charge

The client-confirmed slot, venue or meeting link, and the recorded confirmation channel.

Common questions

What if the client cannot make either time?

Select Request new times in Client coordination and enter the reason. Record the meeting after the client agrees to a slot.

MEDIA CONTENT OFFICER

Deliver a media brief and check enquiry attribution

Complete the assigned deliverable, then use performance and attribution records to follow the results.

My Work › Tasks / My performance

Workspace screens · 54

What to do

1. **Open the assigned media task**
   Check the approved audience, format, deadline and deliverables in the brief. Raise any ambiguity in the task discussion.
2. **Submit the deliverable with its evidence**
   Attach the final files or approved reference to the task and complete the assigned handoff. Follow the task's verification status and address any return.
3. **Check attributable results**
   Open My performance for Media indicators. An attributed prospect is counted once in connection results, even when contacted several times.

Handoff

Media Content Officer › Sales Manager or Managing Officer

The media files or approved links and the completed task. Sales records client contact and authorized attribution separately.

Common questions

Does a linked task let me open the lead's client details?

Lead access follows its own permissions. Keep private contact details out of task text and files shared with people who lack that access.

ARCHITECT

Accept a lead and prepare its design handoff

Follow the assigned client meeting, document the client's decision and prepare the brief for qualification.

My Work › Leads › Client coordination

Workspace screens · 55

What to do

1. **Accept the assignment and offer meeting times**
   Open the intake item in My Work and accept the Architect-in-Charge assignment. Offer at least two times for Sales to confirm with the client.
2. **Record the meeting and client decision**
   After the meeting, record its outcome and the client's decision. When the client agrees to continue, complete the qualification brief with scope, priorities, schedule and supporting checklist files.
3. **Send for qualification and prepare the DSA**
   A Managing Officer qualifies the brief. Then prepare the Design Service Agreement for Finance and independent Managing Officer review. After the DSA is signed, obtain the client-signed Terms of Reference for independent S2 approval before S3.

Handoff
Architect-in-Charge › Managing Officer, then Finance for the DSA
The client's recorded go-ahead, meeting and site evidence, qualification checklist and prepared agreement.

Common questions

What should I do when a reviewer returns the DSA?
Open the current revision from My Work or the lead, address the recorded reason and send it back for the Finance review.

DESIGN MANAGER

Review or return a design programme

See how a Design Manager checks proposed dates and assignments, returns a revision with a reason and hands it back to the Architect-in-Charge.

Plans & design › Project › Programme & stages › Design programme

Assign work in Design Ideation ›

Workspace screens · 56 Returned workspace · 68

What to do

1. **Open the submitted programme**
   In My Work, open Review the design programme. You can also open Harbor Studio Fit-out in Plans & design, then select Programme & stages and Design programme.
2. **Check dates, owners and dependencies**
   In Programme sent for review, check the proposed finish, working duration and each discipline's assignee. Open Dependency network and parallel work to see how the activities fit within the signed agreement.
3. **Approve or send back**
   Choose Approve programme when the revision is ready. If a date or dependency needs correction, choose Send back and enter a specific request, such as asking the architect to align the structural hand-off with the agreed turnaround.
4. **Revise and hand back for review**
   The Architect-in-Charge reads the return reason, opens Propose revised dates, updates and saves the programme, then selects Send to Design Manager. The committed baseline stays in effect until a revision is approved.

Handoff

Architect-in-Charge › Independent Design Manager

A saved programme with dates, assigned disciplines and dependencies. A return adds a reason for the architect to address before resubmission.

Common questions

Can I approve a programme I submitted?

The decision requires an independent reviewer. This also applies when a Managing Officer is eligible to stand in.

Where do I find the approved dates and the review trail?

Open Baselines and review history in the programme. It keeps the original approved baseline and review records.

ESTIMATOR

Build and submit a Final estimate

Build an auditable cost and resource basis from the approved scope, then follow the independent review stages.

Estimates › Final estimate approval

Workspace screens · 57

What to do

1. **Build the scope and resource breakdown**
   Open Estimates and create or open a draft. Check measured quantities, units, approved DUPAs and labor, equipment and material rates. Record assumptions that affect the estimate.
2. **Resolve missing library inputs**
   Open Library requests if an approved material, labor rate, equipment rate or complete DUPA is missing. Supply the requested item's build-up and evidence, including supplier and price for materials.
3. **Send the exact revision for review**
   From Final estimate approval, send the saved revision. It goes through technical review, commercial review and independent final approval by an Assistant Managing Officer or Managing Officer. Address recorded reasons if it comes back.

Handoff

Estimator › Design Manager, Finance & Admin Manager, then an independent Assistant Managing Officer or Managing Officer

The submitted estimate revision with measured scope, resource build-up, costs and supporting assumptions.

Common questions

When can the estimate be linked to the construction project?

Link the Final estimate once its approval is complete. The approved estimate revision is locked and supplies the project's cost and scope basis.

PROGRAMMER

Propose a change to the working Gantt

Adjust future dates and dependencies and hand the proposed resource and cash-flow impacts to the Build Manager.

Program of works › Project › Schedule

Workspace screens · 58

What to do

1. **Confirm the initial construction basis**
   Use the Final estimate and prepare the initial construction plan. The plan goes through Build Manager review, Finance cash-flow review and independent final approval by an Assistant Managing Officer or Managing Officer.
2. **Propose the schedule change**
   In the project's Schedule, select Propose schedule change. Revise dates or sequence, enter a reason and review the effects on resources, long-lead supplies and planned cash flow.
3. **Send to the Build Manager**
   Submit the proposal for review. After approval, compare Current schedule with Approved baseline and Actual progress. Check the affected procurement, equipment, site and Finance handoffs.

Handoff

Programmer › Build Manager

The proposed schedule revision, reason and scope, resource and planned cash-flow effects.

Common questions

Does a new working schedule replace the approved baseline or actual progress?

The approved baseline and recorded actual progress remain available as separate views. The approved proposal updates the working schedule.

BUILD MANAGER

Clear prestart and oversee site delivery

Align the project team on the approved estimate and plan, then check reports and handover evidence.

Projects › Prestart review / Site reports / Close-out

Workspace screens · 59

What to do

1. **Prepare the prestart round**
   Open the project's Prestart review. Check the linked Final estimate and approved initial plan. Confirm the four designated people, including one lead Project in Charge.
2. **Check confirmations and permits before starting**
   Resolve open concerns. Once the Build Manager, Programmer, Architect and lead Project in Charge all confirm, and the required permits are current or have an approved exemption, the assigned Build Manager records the construction start.
3. **Follow site reports and handover**
   Review daily reports and prepare the weekly update. In Close-out, verify punch items and review completion and handover certificates prepared by the site team before final approval.

Handoff
Build Manager and project team › Site team, then authorized Managing Officer for close-out approvals
The four confirmations, current permit status, site evidence and verified completion or handover package.

Common questions

Can preparation or procurement continue before construction starts?
Preparation, planning and procurement can continue. Recording actual site work requires the construction start and any applicable scope-specific controls.

PROJECT IN CHARGE

Submit a daily report from the site

Record which approved scopes were worked on, what resources were used and what arrived.

Site reports › Project › Daily report

Workspace screens · 60

What to do

1. **Choose the project and site day**
   Open Site reports and start or continue the day’s report. Under Work done, use Add work to pick the scheduled BOQ scopes and record the actual work completed.
2. **Add crew, equipment and evidence**
   Record manpower, equipment, safety and issues. Count deliveries through Materials so the receiving reports feed the daily report. Add relevant mobilization and site photos.
3. **Send and check the handoff**
   Send the report and check its status. If it queues offline, keep the draft on the device and reconnect for sync. Once sent, the report waits for the Build Manager.

Handoff
Project in Charge › Build Manager
Dated actual quantities, crew and equipment use, accepted or rejected deliveries, notes and photos.

Common questions

What if an activity happened outside today’s planned scopes?
Use the available scope filters to find a valid approved BOQ line and record what actually happened. Add the required explanation when a work line exceeds its approved quantity.

TECHNICAL PROJECT ENGINEER

Review a concrete pouring request

Verify the proposed pour and pass the recorded engineering review to the right approver.

My Work › Concrete pouring

Workspace screens · 61

What to do

1. **Open the exact pour request**
   Check scope, location, classification, method, quantity, proposed start and inspection plan. Verify the request and proposed permit timing.
2. **Complete the engineering review**
   If you hold the technical assignment in Elevate, record the review confirmations, evidence and notes. Return the request with a clear reason if the evidence is incomplete.
3. **Check where final approval goes**
   An in-app engineer review goes to the independent Build Manager for final permit approval. For the usual outsourced review, the Build Manager records the engineer's signed check and an independent Managing Officer gives final approval.

Handoff

Technical Project Engineer, directly or through the authorized recorder › Independent Build Manager or Managing Officer, according to the review route

The review for the exact pour request, including the signed and dated check when the work was reviewed outside Elevate.

Common questions

Can work start after the engineer reviews the request?

The final permit must also be approved within the required notice window before the pour can start.

PROCUREMENT OFFICER

Canvass and issue a purchase order

Use the approved scope and budget basis before pricing, requesting approval and sending an order.

Site delivery › Materials › Orders › To order

Workspace screens · 62

What to do

1. **Open the approved request to order**
   In To order, check the scope, quantity, delivery place and Scope and budget basis. Select the line and use Order 1 selected to start the order.
2. **Prepare the order and attach support**
   Enter the supplier, lines, delivery and payment terms. Supply the quotes or single-source reason where required. Above-estimate prices need a recorded reason and the supporting evidence the screen asks for.
3. **Send for approval, then issue the order**
   Select Send for approval to route it to the authorized financial approver. After approval, use PDF for the supplier and choose Mark as sent once you dispatch it.

Handoff
Procurement Officer › Finance & Admin Manager or Managing Officer
The scope-linked order, quote support and any required variance reason or evidence.

Common questions

Does an approved purchase order record a delivery?
Receiving is a separate step. The site receiver or warehouse officer records actual accepted and rejected quantities.

MATERIALS & EQUIPMENT OFFICER

Receive warehouse stock and issue it to site

Record what arrived at the warehouse and what was subsequently issued to the project.

Site delivery › Materials › Deliveries / Stock

Workspace screens · 63

What to do

1. **Open the warehouse delivery**
   Under Deliveries, choose the warehouse in Receiving at. Find the order in Expected deliveries and select Receive.
2. **Record what arrived**
   Enter Delivered and Rejected quantities and the reason for any rejection. Check the calculated Accepted quantity, attach photos of the goods and receipt, then select Send delivery record.
3. **Issue stock against a request**
   Open Stock, then To send from stock. Record the quantities physically handed to the site. In Equipment, use the approved request to assign available owned units.

Handoff

Materials & Equipment Officer › Project in Charge and Procurement Officer

The warehouse receiving record, quantities issued to the project and any shortages or rejected goods that need follow-up.

Common questions

When does a warehouse delivery count as delivered to site?

Once the stock is physically issued and recorded against the project. Until then the warehouse receipt stays distinguishable from site delivery.

FINANCE & ADMIN MANAGER

Verify supplier advance VAT evidence

Follow the Finance handoff from the supplier invoice to the evidence Accounting needs to avoid counting VAT twice.

Finance › Accounting › Journals › From Payments and Billing

Workspace screens · 64

What to do

1. **Find the advance in Payment & billing entries**
   Open Finance, Accounting, Journals and From Payments and Billing. Match the source reference to the supplier's approved invoice and open Confirm advance VAT evidence when it is available.
2. **Record what the supplier invoiced**
   For a separate VAT invoice, enter the VAT shown, select the matching invoice attachment and give an evidence reference and reason. If the supplier issued no separate VAT invoice, use that confirmation only after verifying the supplier records.
3. **Check for VAT already recorded on the advance**
   On an eligible final invoice applying the full advance, select Match earlier advance VAT. Choose the earlier invoice and whether the final invoice includes VAT already booked or shows only the VAT still charged. Add the reference and reason.
4. **Hand off the evidence for accounting**
   Save the confirmation or match. The source keeps its evidence for Accounting, and any resulting journal requires independent approval. Keep an unmatched item held while you obtain the missing reference or attachment.

Handoff
Finance & Admin Manager or authorized Managing Officer › Accountant / Bookkeeper
The invoice reference, the matching attachment where required and Finance's recorded VAT basis and reason.

Common questions

Does confirming VAT evidence post a journal?
Evidence confirmation saves the invoice facts. Eligible source journals still go through independent approval and Accountant processing.

What if I opened the wrong source?
Choose Back to sources to close the evidence form and clear those unsaved entries.

ACCOUNTANT / BOOKKEEPER

Review held entries and hand off journals

Follow the Accountant's queue, see who acts next and learn which entries can move to independent review or remain held.

Finance › Accounting › Journals › From Payments and Billing

Workspace screens · 65

What to do

1. **Read the source before processing**
   In From Payments and Billing, find the entry by its reference. Check the source date, status and reason. On hold · review required tells you to resolve the evidence, mapping or treatment before expecting a journal.
2. **Send evidence exceptions to Finance**
   For an unresolved supplier advance or a VAT match, give Finance the source reference and the missing or conflicting evidence. A partial retention release also needs earlier posted retention to support the release.
3. **Process eligible sources and open the journal**
   Use Process pending entries for eligible sources. Select Open journal on a linked entry. Check the reference, evidence and journal lines before the independent Finance & Admin Manager or Managing Officer approves or sends it back.
4. **Check what actually posted**
   On a subsequent processing pass, eligible approved source journals post after the controls recheck. Check the batch totals and held reasons. Only posted journals update the balances.

Handoff

Accountant / Bookkeeper › Independent Finance & Admin Manager or Managing Officer

The exact linked journal and supporting source reference. After independent approval, the Accountant processes the posting.

Common questions

Can two accounts belonging to one person prepare and approve a journal?
The approval requires a different person. Separate accounts linked to the same person do not qualify.

What needs approval before the new live posting treatments can start?
The live holds stay in effect until the real opening balances, actual cash books and cutover date are approved. The examples use fictional entries.

When can I use Settle outside Elevate?
Use it only for an item already booked in the outside ledger. Enter the reference, date and reason for independent approval. Unresolved items stay held.

Where can I review the ledger's coverage?
Open Accounting, Reports and Month-end reports to review source coverage for the period. Use the held reasons in From Payments and Billing to follow up unresolved items.

MANAGING OFFICER

Review a lead, agreement and close-out

See where management decisions protect the intake, agreement and final project closure.

My Work › Leads / Estimate & plan approvals / Close-out

Workspace screens · 66

What to do

1. **Review and qualify the lead**
   Open the intake item in My Work or Leads. Check the client and project basis for the first decision. At qualification, verify the architect's recommendation and meeting evidence before deciding.
2. **Preview and decide the agreement**
   After Finance reviews the Design Service Agreement, open its complete print preview. Check the parties, authorized representative where required, scope and payment terms, then approve or return with a specific reason if eligible.
3. **Review the handover and financial closure**
   Open the project's Close-out record. Check certificate approvals and the financial checklist, including unresolved billing, retention, supplier items and reconciled Accounting sources, before confirming closure.

Handoff
Architect, Finance or Build Manager › Independent Managing Officer
The exact current submission and its supporting records, with the decision or return reason kept in history.

Common questions

May I approve an agreement I prepared or changed?
The agreement requires an independent approver. If you made changes, refer it to another eligible Managing Officer.

ASSISTANT MANAGING OFFICER

Review team performance and company targets

Find the team's indicators and deadlines and follow up without taking over the underlying assignment.

My performance › My people / Targets

Workspace screens · 67

What to do

1. **Open the team performance view**
   In My performance, choose My people when available. Select the personnel or team to review indicators and follow up on the underlying work.
2. **Review definitions before changing targets**
   In Targets, check the reporting year and the indicator definition before updating company targets you are authorized to manage.
3. **Follow up on overdue work and approvals**
   Use the permitted oversight views to identify items that need action by their owners. Review Library requests assigned to you after Finance and Admin completes its review.

Handoff

Assistant Managing Officer › Role lead or current work owner

The relevant KPI, deadline or approval reference and the follow-up needed.

Common questions

Does the team view assign me the person's task?

Operational work stays with the current owner. Use the action on the record only when your role is authorized for that step.

SHARED WORKFLOW

Qualify a lead and record the signed agreement

Take the client's requirements from qualification through Finance review and client signing.

Project setup › Leads › Lead record › Design Service Agreement

What to do

1. **Send the lead for qualification**
   The Architect-in-Charge records the client's decision, site and scope details, and supporting files. Choose Send to be qualified. A Managing Officer checks the package and chooses Approve as a qualified project or sends it back.
2. **Prepare the agreement**
   Choose Prepare the Design Service Agreement. Record the services, design fee and any required authorized representative, save, then choose Preview Design Service Agreement and Send to Finance.
3. **Confirm terms and authorization**
   Finance checks the fee, payment schedule, discount and VAT treatment. Save the terms and choose Terms are final: send to a Managing Officer. The eligible officer checks the saved agreement and chooses Approve or Send back.
4. **Record the signed PDF**
   When the approved agreement is signed, the authorized recorder chooses Record the signing. Enter the signing date and project details, attach the client-signed agreement PDF, then choose Record signing.

Handoff

Architect-in-Charge › Finance & Admin Manager, then Managing Officer

Qualified scope, saved commercial terms, independent decision and a client-signed agreement PDF retained against the project.

Common questions

Why is the agreement on hold after the lead was reopened?

The recommendation must be qualified again. After that, send the saved agreement through Finance and Managing Officer approval again before signing.

SHARED WORKFLOW

Carry the signed TOR through to issued drawings

Record the design brief, clear the checks for schematic work and hand the current issued set to the next team.

Plans & design › Project › Programme & stages › Design stages

What to do

1. **Record the signed design brief**
   In S2, choose Prepare TOR, enter the confirmed design requirements and save. Use Record client-signed copy to attach the client-signed PDF to the current Terms of Reference revision.
2. **Verify S2 and send the schematic set**
   Choose Send S2 for review. The independent reviewer checks the brief and current signed file, then chooses Approve S2 or Send back. Keep the agreed schematic evidence with S3 and choose Send S3 for review when ready.
3. **Issue the drawings and check coverage**
   In Plan register, submit the revision PDF for review. Record the client's approval with signed evidence when required. Before submitting S6, verify issued coverage for each drawing discipline promised in the signed agreement and current sealed sets where required.
4. **Hand over the issued set**
   Resolve in-progress revisions and verify issued sheets before sending S7 for review. Site staff confirm the issued drawings in Plan register. Pass the approved design reference to Estimating and Planning.

Handoff

Architect-in-Charge › Independent design reviewer, then Estimating, Planning and site team

Client-signed TOR at its current revision, review history, current issued PDFs and sign-and-seal evidence where required.

Common questions

Why is a replacement drawing still showing as uncovered?

Sealed coverage is checked against the exact issued revision. Record matching returned sealed evidence for the replacement drawing before relying on it for IFC release.

SHARED WORKFLOW

Approve the estimate and turn it into a working programme

Follow the separate approvals for cost and schedule, then use the approved programme to plan site resources.

Design & planning › Estimate & plan approvals › Program of works

What to do

1. **Approve the exact estimate revision**
   Open Final estimates and choose Send estimate for review after scope, quantities and rates are saved. Design reviews the technical basis, Finance reviews the commercial basis, and an eligible AMO or MO gives final approval.
2. **Approve the construction baseline**
   Open Initial construction plans. The Programmer prepares the schedule against the approved Final estimate, chooses Save plan draft, and then Send plan for review. The Build Manager reviews it, Finance checks the cash-flow basis, and an eligible AMO or MO approves the baseline.
3. **Use the working schedule to plan supply**
   In Program of works, open Schedule for the Gantt and Supply readiness for upcoming needs. Use the programme dates to plan material and equipment requests or flag a long-lead item. Recheck readiness if the programme dates move.
4. **Review significant date changes**
   Use Propose schedule change and Send to Build Manager with the reason. The assigned reviewer checks the affected scope and planning impacts before publishing a working forecast. The approved baseline and actual progress remain available for comparison.

Handoff

Estimator and Programmer › Independent reviewers, then the Build Manager, site team, Procurement and Stores

Approved Final estimate, approved construction baseline, recorded schedule revisions and an up-to-date supply look-ahead.

Common questions

Does the Gantt place purchase orders automatically?

Programme changes help identify and review upcoming needs. Use the normal request and purchase order actions to make commitments.

SHARED WORKFLOW

Request materials, workers or subcontracted work

Connect resource requests, worker assignments and job orders to the approved work they support.

Site delivery › Materials › Requests or Manpower › Requests / Subcontracts

What to do

1. **Request materials against approved work**
   In Materials, choose the project and select New request. Link the bill-of-quantities (BOQ) line, enter the material, quantity, needed date and destination, and record any reason the form needs before sending.
2. **Review the request before committing supply**
   The Build Manager reviews the request. Design review applies when materials differ from the plans, and a Managing Officer reviews any over-budget part. Approved lines appear in To order or may be fulfilled from eligible warehouse stock.
3. **Route direct crew separately**
   In Manpower Requests, choose New manpower request. Record the needed trade, workers and dates against the project work. After Build Manager approval, the authorized assignee uses Assign workers.
4. **Use a job order for subcontracted scope**
   In Manpower Subcontracts, choose New job order. Record the subcontractor, scope basis, agreed terms and supporting quotes or reason. Use the job order's approval and accomplishment process before billing against it.

Handoff

Project in Charge and Build Manager › Procurement or Stores for materials, and the assigned worker or subcontract reviewer for labor

Approved scope and quantities, timing and destination, variance explanations when required, and the approved commitment or assignment.

Common questions

Which payment path do I use if a subcontractor has a job order?

Use the linked labor billing on the job order. The Build Manager certifies the supported accomplishment before the applicable payment approval.

SHARED WORKFLOW

Clear permits and start construction

Record permit and team readiness for the first construction start or a required revalidation.

Design & planning › Permits, then Project teams › Prestart review

What to do

1. **Check what the project needs before construction**
   In Permits, open the project and read Before construction. Prepare the application and required documents. After the assigned review and approval, file it, attach the receiving copy or receipt, and choose Record it issued when the permit is issued.
2. **Record any applicable exemption**
   If an administrative exemption applies, open the permit requirement in Prestart review and choose Request a permit exemption. Include the reason and evidence for the independent Managing Officer decision.
3. **Prepare and confirm the team review**
   Open Prestart review. The Build Manager or Managing Officer designates one lead Project in Charge and prepares the review using the current approved basis. The Build Manager, Programmer, Architect and lead Project in Charge each record their own confirmation.
4. **Start the work**
   With permits ready, four current confirmations and no unresolved concerns, the assigned Build Manager chooses Start construction. If Elevate asks for a new round, check the changed basis and get fresh confirmations before starting the affected work.

Handoff

Permit preparers and four named project reviewers › Assigned Build Manager

Current permit or approved-exemption records, the current estimate and programme basis, and four independent role confirmations.

Common questions

Can people prepare while the construction start is pending?

Planning, procurement and preparation remain available. Recording actual site work requires the applicable construction-start clearance.

SHARED WORKFLOW

Route variations and explain cost overruns

Keep client scope changes separate from the approval to fund a cost overrun.

Budget & contract › Variation requests / Variation orders, or Finance › Contingency

What to do

1. **Document a change in scope**
   The Build Manager or Project in Charge opens New variation request and records what changed, the client contact, affected work and evidence. The Architect coordinates any design change or routes the request for pricing.
2. **Price and record the decision**
   The owning Estimator saves the linked variation order. A Managing Officer independently reviews the price. For a chargeable order, the authorized Architect or Estimator uses Record client answer and attaches the signed answer for the approved version.
3. **Replan the affected work**
   After an approved change applies, the Programmer prepares the required programme revision. Check the affected BOQ lines in Prestart review, and wait for the required review and start before resuming held work.
4. **Route a cost overrun separately**
   Record the variance reason and supporting evidence on the affected record. If using an approved contingency reserve, review the separate draw in Finance Contingency. Its path goes through Build Manager review, Finance verification and Managing Officer approval.

Handoff

Site team and Architect › Estimator and Managing Officer, then Programmer and Build Manager

Linked request, approved price, signed client answer when required, revised programme and any separately approved contingency allocation.

Common questions

Does approving the order also approve its contingency draw?

The order and the draw have separate review paths. Check each record’s decision and use the recorded status as your basis.

SHARED WORKFLOW

Send progress billing and record collections

Certify progress against the signed terms, then track the statement, invoice reference and cash received.

Finance › Client billing › Projects / Open billings / Collections

What to do

1. **Prepare progress to date**
   Confirm the signed build contract and linked Final estimate. The Build Manager opens the project and chooses New progress billing. Enter the cutoff and verified line-by-line progress. Use the daily report percents to fill a starting point, then check it.
2. **Send the draft for review**
   Check the billing against the approved contract basis and applied changes. Choose Send for approval. The assigned Finance or Managing Officer approver uses Approve billing or sends it back with a reason.
3. **Send the statement and invoice**
   Finance sends the approved statement and the separately issued invoice to the client. In Elevate, choose Record as sent and enter the date and invoice reference. Confirm the statement's due date in the project.
4. **Record cash and outstanding balance**
   On the sent billing, use Record payment. Enter what was actually received, with its date and supporting reference. Record withholding evidence separately when it applies, and use Collections or the statement of account to follow up.

Handoff

Build Manager › Independent billing approver, then Finance or Accountant

Certified progress, the approved statement, sent date and invoice reference, and payment and withholding evidence where applicable.

Common questions

Why can't I send a progress billing yet?

Check that the contract and Final estimate are linked, the billing basis is current, and any required downpayment billing has already been approved.

SHARED WORKFLOW

Match, approve and release a supplier payment

Use the approved purchase order, invoice and receipt evidence to request payment and document its release.

Finance › Payments › New request / To approve / To release

What to do

1. **Match the purchase and delivery**
   Open the approved purchase order, supplier invoice and receiving record. Check accepted quantity, any rejected goods, and previous payments against that order. Use the documented order terms for an authorized downpayment before delivery.
2. **Prepare and send the request**
   In Payments, choose New request and select Supplier payment. Link the approved order, attach the invoice and enter the amount supported by the documents. Record required variance evidence, then choose Send for approval.
3. **Follow the approval route**
   The assigned Finance or Managing Officer approver checks the payee, approved commitment, invoice and delivery evidence. If the request returns, correct the specific mismatch and send it for review again.
4. **Document the release**
   Authorized Finance opens To release and chooses Release payment after checking the approved request and actual payment details. Keep the release reference. Review any accounting hold separately before journal posting.

Handoff

Procurement and the receiving team › Independent payment approver, then Finance for release

Approved purchase order, invoice, accepted delivery or authorized advance basis, approval history and payment reference.

Common questions

Does releasing the payment resolve an accounting hold?

Release records the payment. Use Accounting to review any separate posting hold or missing evidence.

SHARED WORKFLOW

Verify punch items, hand over and close the project

Use evidence to move from completion to handover, warranty response and financial closure.

Site delivery › Close-out › Punch list / Completion & handover / Warranty / Financial closure

What to do

1. **Record and verify defects**
   Use New punch item to log location, severity, owner and photos. After repair, choose Record the fix and attach after photos. The Build Manager checks the fix on site and verifies or reopens it.
2. **Obtain completion and handover approval**
   In Completion & handover, send the completion certificate after critical items are resolved and evidence is ready. For handover, verify every punch item and include the occupancy permit, signed checklist and handover documents. The Build Manager reviews, then a Managing Officer decides.
3. **Handle warranty calls**
   After approved handover, open Warranty and choose Log a call-out. Record the report and location, then save the visit finding, coverage decision and repair evidence as applicable.
4. **Finish the final account**
   In Financial closure, the Build Manager or Finance prepares the final account. Resolve outstanding billings, collections, retention and open commitments. A Managing Officer closes the project when the warranty and settlement checks are met.

Handoff

Site team › Build Manager, Finance and Managing Officer

Verified punch list, approved certificates, signed handover package, warranty history and final account with settlement support.

Common questions

Does the approved handover close the project financially?

Handover records client acceptance and starts the warranty. Financial closure has its own checks for the warranty, final account and outstanding items.

SHARED WORKFLOW

Assign design work to an architect or discipline owner

Give each design track an owner, agree its dates, and see who reviews the work before issue.

Plans & design › Project › Programme & stages › Design programme

Related screen: Design programme review ›

What to do

1. **Name the project lead when needed**
   After a Managing Officer accepts the lead, the Design Manager opens Project setup Leads and chooses Name Architect-in-Charge. The named architect accepts the assignment and leads client coordination and the design programme.
2. **Set owners and dates in the proposal**
   The Architect-in-Charge opens Propose programme in Design programme, sets the Working days and Architect for applicable tracks, and chooses Save proposal and Send to Design Manager. An independent reviewer checks owners and dependencies before choosing Approve programme.
3. **Assign or change an active track**
   The Design Manager opens Your track actions, selects the discipline and uses Track assignment Architect Save assignment. Check the owner and due date in Project board. Architect roster lets the Design Manager see assignments across projects.
4. **Review the design output**
   The assigned architect follows the track in My Work and submits the applicable revision PDF in Plan register. A roster drawing goes to independent consolidation and design review. Keep the signed TOR and S2 approval in place before new S3 schematic work.

Handoff

Design Manager and Architect-in-Charge › Assigned architect, then independent design reviewers

An accepted lead assignment, programme dates with an explicit discipline owner, and the drawing or stage review record.

Common questions

Should I assign ideation from Tasks or the Design programme?

Use Design programme for ownership tied to a design discipline, its dates and review. Use Tasks New task for a separate action such as returning a marked-up reference or confirming a meeting.

SHARED WORKFLOW

Assign tasks, delegate work and verify closure

Choose a single task for one instruction or build a Taskflow when steps depend on each other.

Tasks › New task or Tasks › Taskflows › New taskflow

What to do

1. **Give a single task**
   In Tasks, choose New task. Enter Task title, Instruction, Due date and People responsible. Add a checklist, references or watchers if useful and choose Create task. Each person selected receives a separately numbered task.
2. **Sequence connected work**
   In Taskflows, choose New taskflow. Name the goal and enter each step's instruction, responsible person and due date. Under prerequisites, select the earlier steps it must wait for, then choose Create taskflow. Steps with no prerequisites can run in parallel.
3. **Accept, complete and verify**
   An assignee opens the item in My Work or Tasks and uses Accept request if needed. Complete the work, choose Mark done and add a note or proof. The verifier chooses Verify and close or Send back. Dependent steps wait for verified closure.
4. **Delegate an open task safely**
   An eligible lead can use Transfer responsibility on an open standalone task, with a reason. The task keeps its due date. For a Taskflow step, the person running the flow proposes an edit for independent superior approval.

Handoff

Assigner or person running the Taskflow › Assignee, then verifier and released successors

The due date, required acceptance, completion note or files and verified closure are visible in task history.

Common questions

I marked a step done. Why is the next step still waiting?

The verifier must close every prerequisite. If the person running the flow both did and verified a prerequisite, an eligible second person must confirm it before it can release dependent work.

SHARED WORKFLOW

Find your work, set deadlines and request a change

Use your personal queue and follow the supervisor's review when a handoff date needs to move.

My Work › Team deadlines, or Tasks › Task record

What to do

1. **Find the work that is waiting on you**
   Open My Work and choose the assignment, review or reminder relevant to your role. Open its record for the current owner and decision. If an actionable workflow has no agreed date, its eligible supervisor opens Team deadlines and chooses Set deadline.
2. **Request a deadline change**
   Use Request deadline change on eligible My Work entries, or Reschedule on a task. Enter the proposed date in Manila time and explain why it needs to change. The current deadline stays in force during review.
3. **Decide the request independently**
   The eligible supervisor chooses Review deadline change in Team deadlines or opens their My Work review. Check the reason and both dates, choose Approve requested deadline or Keep current deadline, and save the decision with a note. Task reviews may also appear in the task record.
4. **Check history and cover a handoff**
   Authorized managers can see the Dashboard's view-only Deadline changes summary. Eligible approvers can arrange a dated backup using My Work More While I'm away. Follow the approver or escalation named in the workflow when a review is blocked.

Handoff
Responsible team member › Current independent supervisor
Original and proposed deadlines, request reason, reviewer note and the final recorded decision.

Common questions

Does a new My Work deadline change the contract, programme or permit dates?
It sets an operational follow-up date. Use the relevant contract, programme or permit workflow to change its own approved dates.

SHARED WORKFLOW

Post a team update, reply and find notifications

Share updates with the right audience and keep decisions in the record they belong to.

Team wall · Notifications · My calendar

What to do

1. **Share a team update**
   In Team wall, use Write a wall post. Add photos with Photos or select another post type if available. Check what the team can see, then choose Post.
2. **Reply where the work belongs**
   Open a post's comments and choose Reply for a specific comment. Use @ to mention a team member or the available attachment control for a supporting file. Keep restricted project evidence in its own task or project record.
3. **Find an update or upcoming work**
   Open Notifications from the bell and choose a Team updates item to open its source. Mark all read clears the unread state. Use My Work for assignments and My calendar for deadlines, meetings and private events.

Handoff
Team member posting the update › Relevant readers or assigned work owner
The posted update or record comment, together with any permitted supporting file.

Common questions

Does reading a notification complete its assignment?
Open the underlying task or approval from My Work and perform its required action. The notification tracks whether you have read the update.

SHARED WORKFLOW

Share a design package or route a design change

Assign a bounded drawing or takeoff package, or route a change that needs a formal approval.

Design & planning › Design packages or Plans & design › Changes › Design changes

What to do

1. **Set up a package**
   Open the project in Design packages and choose Drawings or Estimating. Use Assign architects or Assign estimators to set the eligible team. Choose Add package and record its scope and responsible person. Site master and floor plans remain with the Architect-in-Charge.
2. **Deliver and review a package**
   Use Open package or Take this package when eligible. Save work with the linked drawing or traceable takeoff and choose Send package. The assigned reviewer records the decision. Use the normal drawing-issue or estimate approval workflow for release.
3. **Route a formal design change**
   In Design changes, record why the design is changing, the affected drawings, and impact evidence. Choose Send to the Design Manager. After design review and the Managing Officer's decision, record the client's answer when required and follow the revised sheets through issue.

Handoff
Architect-in-Charge or authorized package manager › Assigned architect or estimator, then independent reviewer
Package scope and submitted work, or the design change's reason, affected revisions and approval record.

Common questions

When should I open a Variation request too?
Use the linked construction variation workflow when the requested design change affects contracted site scope, cost or work already built or ordered.

SHARED WORKFLOW

Assign equipment, hire from a supplier and record return

Request equipment against approved scope and track it from assignment or rental through actual return.

Site delivery › Equipment › Requests / Our equipment / Rentals

What to do

1. **Request equipment against the work**
   In Requests, choose Request equipment for the selected project and record the linked work item, quantity and dates. Choose Send for approval. The Build Manager reviews, and a Managing Officer decides on any over-budget portion.
2. **Cover the approved need**
   On the approved request, use Assign one of our units for available company equipment. For uncovered units, choose Pass to Procurement to rent. Procurement uses Rent from a supplier, checks the supplier, dates and cost, and sends the rental for approval.
3. **Record arrival, return and invoice evidence**
   On the approved rental, use Arrived on site and Returned to the supplier when those events occur. Record the actual dates and use Prepare invoice payment when eligible. Check settlement separately if the estimate and actual charges differ.

Handoff

Project in Charge and equipment team › Procurement for uncovered units, then Finance for payment

Approved request and rental, assigned unit or supplier, agreed period, actual arrival and return, and invoice support.

Common questions

What happens if a unit goes back early?

Record its actual return date. Open the request again to see the remaining need and use the appropriate assignment or rental handoff.

SHARED WORKFLOW

Request leave or correct a staff attendance record

Use the staff HR workflow to submit the right request and track its decision privately.

Team › Staff HR › Requests › My requests

What to do

1. **Choose the right request type**
   Open Staff HR and choose New request. Select Company leave, Statutory leave review or Attendance correction, as applicable. Enter the affected dates and reason, and provide requested evidence.
2. **Submit your saved draft**
   Choose Save draft, reopen it and check its details. Choose Send request. Follow the status and the person in charge in My requests. If the request returns, read the reviewer's reason before resubmitting.
3. **Review and record the outcome**
   The appointed reviewer opens the request from Staff HR or My Work. Use the available actions, such as Start checking or Complete check, and record supporting evidence before a decision. Use People & leave for permitted balance and movement records.

Handoff

Team member making the request › Appointed HR checker and eligible reviewer

Request dates and reason, supporting attendance or leave evidence, decisions and any separately approved balance movement.

Common questions

What if my leave balance is missing?

Check with the authorized HR reviewer. A balance appears after its opening figure is verified. The request's own current status is visible in My requests.

SHARED WORKFLOW

Mark site crew attendance and prepare weekly payroll

Record days worked against the project and send a supported payroll for independent review.

Site delivery › Manpower › Attendance / Payroll

What to do

1. **Complete the attendance week**
   In Attendance, select the project and week. Mark each required day Full day, Half day or Absent, and enter actual overtime where applicable. Check the workers and save the changes.
2. **Prepare payroll from the saved week**
   The Build Manager chooses Prepare this week's payroll, checks attendance, rates and deductions, and uses Send for approval after the week ends. An eligible independent Finance or Managing Officer reviewer chooses Approve or Send back.
3. **Record payout and later corrections**
   Authorized Finance chooses Record payout and records the actual payment details. If a paid week needs correction, use the supplementary payroll path when offered, with the corrected attendance and reason.

Handoff

Site attendance recorder and Build Manager › Independent payroll approver, then Finance for payout

Saved attendance, reviewed amounts and applicable deductions, approval history and payout record.

Common questions

Why can't I prepare or update the payroll?

Check for required days marked Not marked and for unsaved changes. Use Absent only when the worker was actually absent.

SHARED WORKFLOW

Reconcile statements and check readiness for month-end

Check posted balances, held sources and cash-book reconciliations before closing a period.

Finance › Accounting › Journals / Reconciliation / Reports / Periods

What to do

1. **Check journals and source holds**
   In Journals From Payments and Billing, read held or incomplete source items. Resolve missing evidence with the responsible owner and use the separate journal review and posting actions for eligible entries.
2. **Match the statement to the books**
   In Reconciliation, choose Record statement and enter the cash book, reference, statement period, balances and actual movements. Match each movement to the exact book entry. An eligible independent reviewer checks outstanding entries and the zero difference before finalizing.
3. **Review the month before closing**
   Open Reports Month-end reports and check the Trial balance and Account ledger as appropriate. Resolve open journals and outstanding reconciliations. In Periods & cash books, an eligible Finance or Managing Officer reviews the period checks and chooses Close period when ready.

Handoff

Accountant / Bookkeeper › Independent Finance & Admin Manager or Managing Officer

Matched statement and cash-book records, source hold dispositions, posted journals and the reviewed period-close decision.

Common questions

Can I treat the trial balance as complete if sources are held?

Only posted entries affect the trial balance and ledger. Check the held source list and the month-end coverage before relying on completeness.

SHARED WORKFLOW

Request a new library item and review it for publication

Create a supported material, labor, equipment or DUPA proposal and track its independent reviews.

Libraries › Library requests

What to do

1. **Prepare the proposal with its basis**
   Use Request new material, or find labor, equipment and DUPA in More. Enter the specification, unit, supported rate and applicable supplier. For DUPA, add its complete build-up from approved resources. Choose Send for review.
2. **Check the independent reviews**
   Different eligible people choose Record Finance review and Record Admin review in either order. If a correction is needed, choose Send back to the requester with the reason. The requester corrects and resubmits it for both reviews.
3. **Publish the reviewed proposal**
   After both reviews, an independent Assistant Managing Officer or Managing Officer chooses Approve & publish. The item becomes available as a new catalogue or DUPA selection.

Handoff

Requester › Finance and Admin reviewers, then independent Assistant Managing Officer or Managing Officer

Rate or build-up basis and the reviewed proposal, with two stamped reviews and a final decision in history.

Common questions

Does a newly published rate update quantities or prices already in estimates?

Existing estimate scopes retain their recorded basis. The approved entry becomes available for new selections.

SHARED WORKFLOW

Find project files, check access and ask for help

Open the current document and send a private ticket when you need help with the workspace.

Project or lead record › Files, or Team › Help & Support

What to do

1. **Find and verify the right document**
   Open Files on the lead or project. Expand the relevant folder, open the file to preview it and check its revision where applicable. Use the download button for a copy. Authorized users may upload into the appropriate folder.
2. **Check when a link will not open**
   Confirm you are in the intended account, project and current assignment. Ask the responsible owner to check your access. A task, mention or notification about a record still requires that record's permissions.
3. **Send a private support ticket**
   Use Help or choose New ticket in Help & Support. Select a category, describe the steps and attach a screenshot if needed, with unrelated private details removed. Choose Send to Administrator, then follow the reply in My tickets.

Handoff

Person finding a file or reporting a problem › Project owner for record access, or Administrator for support

A document reference and revision, or a private ticket with the affected screen, steps and optional screenshot.

Common questions

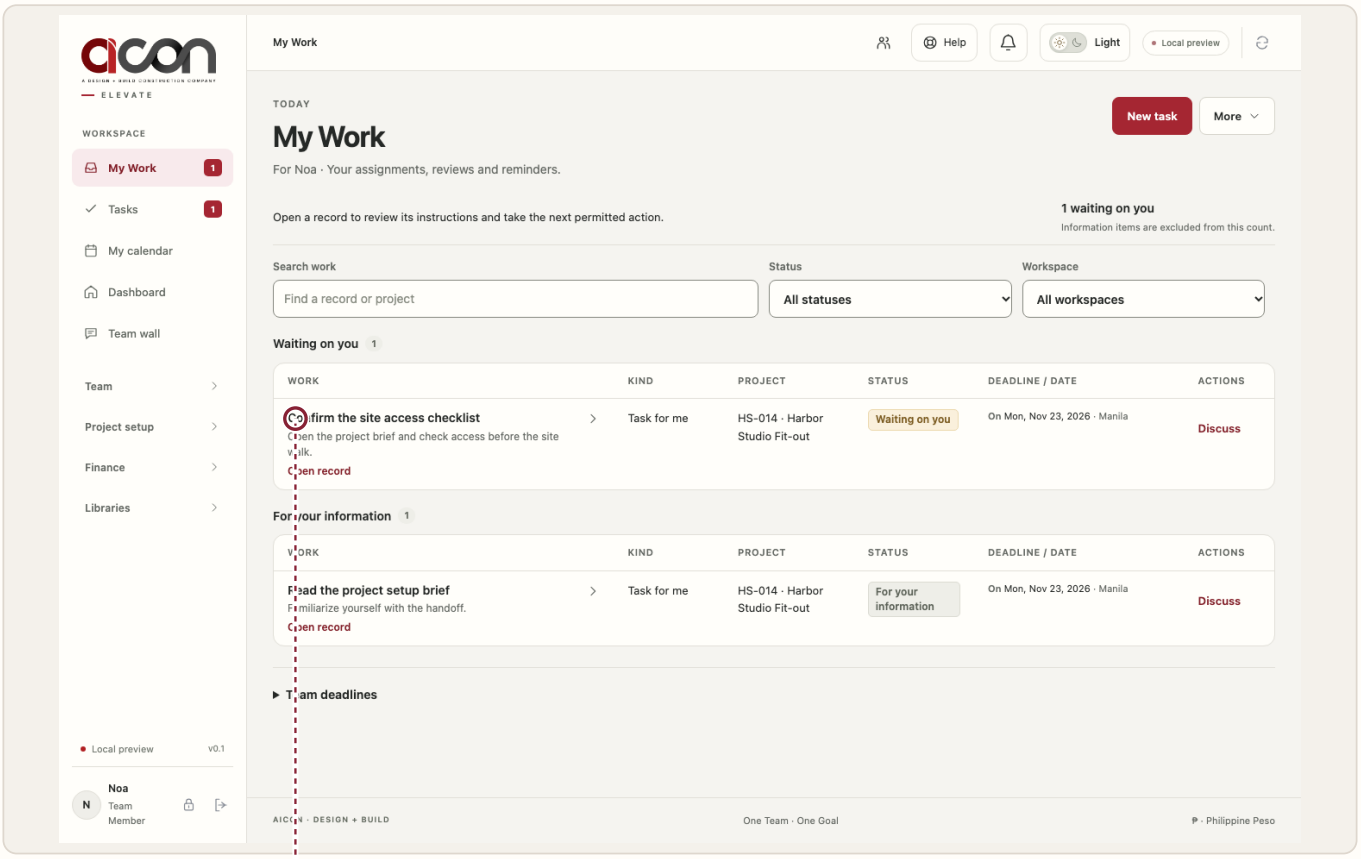
Can support change an approved estimate or grant me a project role?

Support can help locate the right workflow. The authorized owner must make the correction or role assignment through the project's governance process.

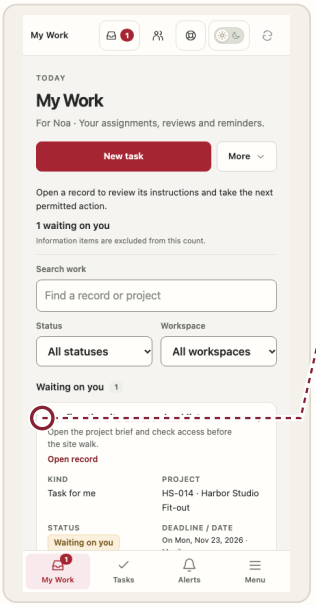
Team Member · My Work

See the assignments waiting on you and their deadlines.

DESKTOP



PHONE



Open the assigned work

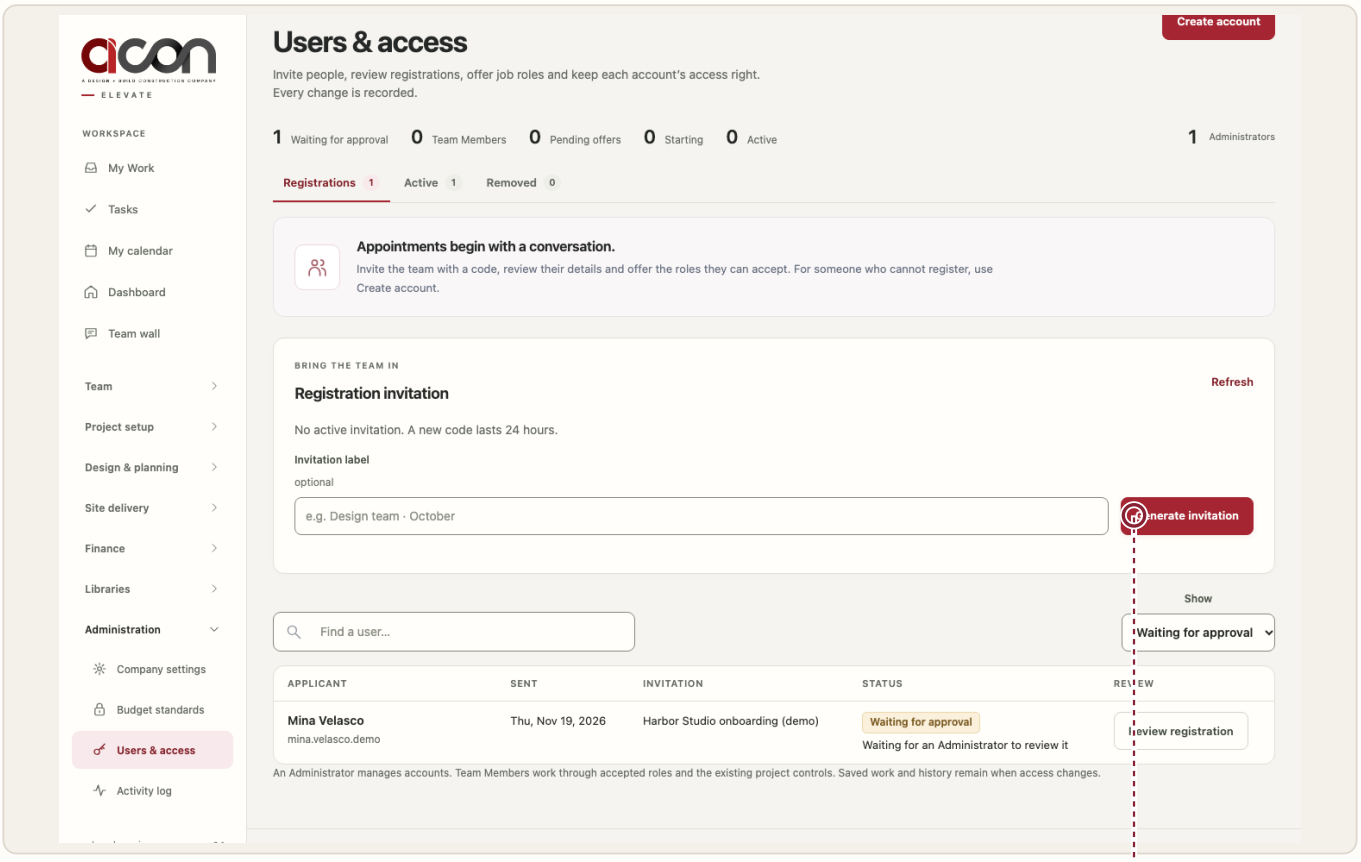
Select the task title to read what you owe, its deadline and any supporting files.

Return to guide ›

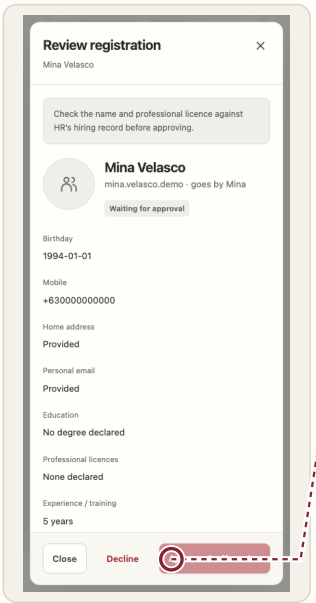
Administrator · Users & access

See a registration invitation on desktop and the applicant review on phone.

DESKTOP



PHONE



Invite and review staff

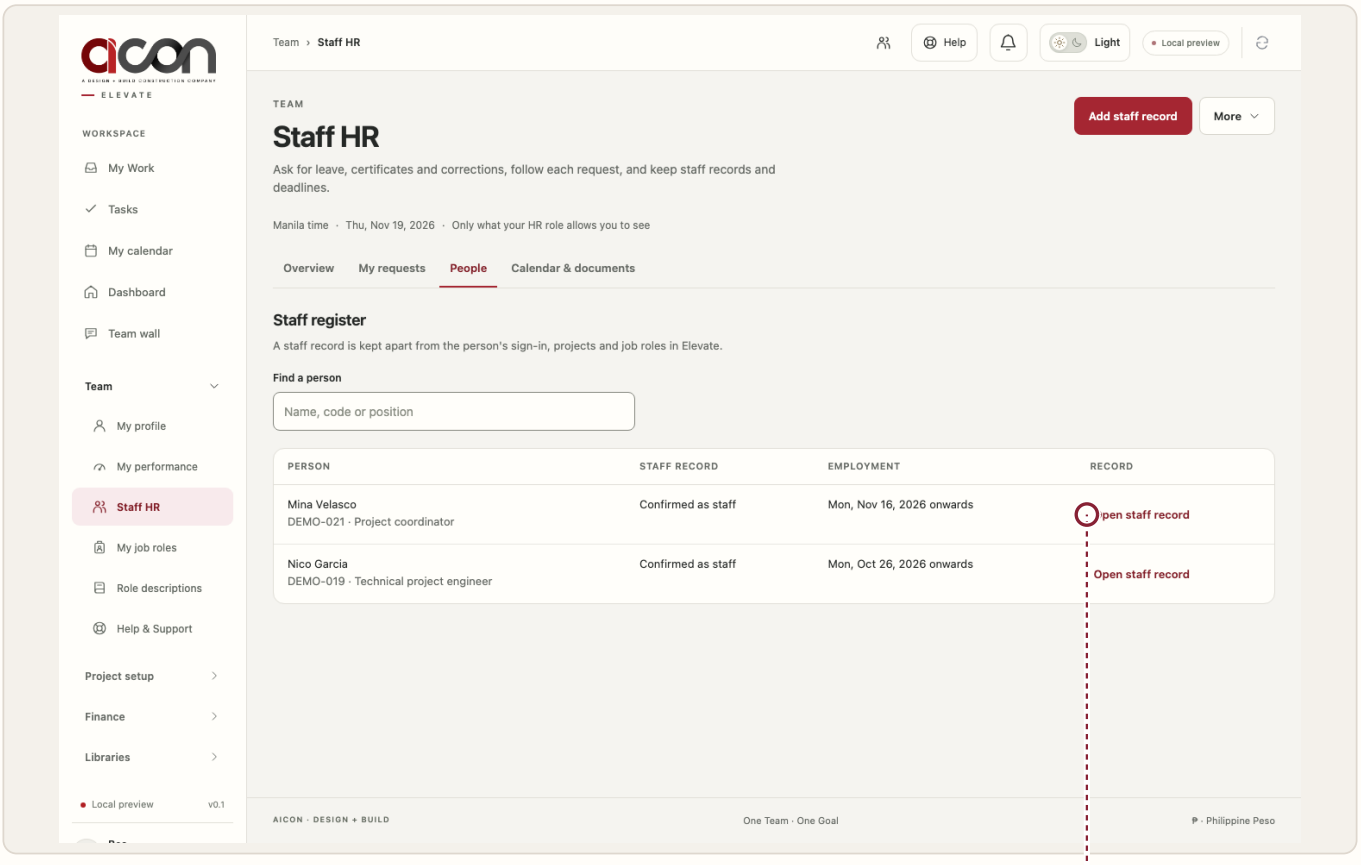
Generate a registration invitation. When the applicant appears, check the hiring record and review before offering roles.

Return to guide ›

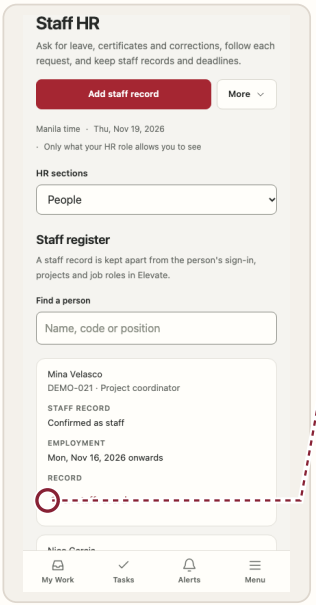
HR Officer · Staff register

Open a fictional staff record as an HR Officer with an active scoped appointment.

DESKTOP



PHONE



Open the staff record

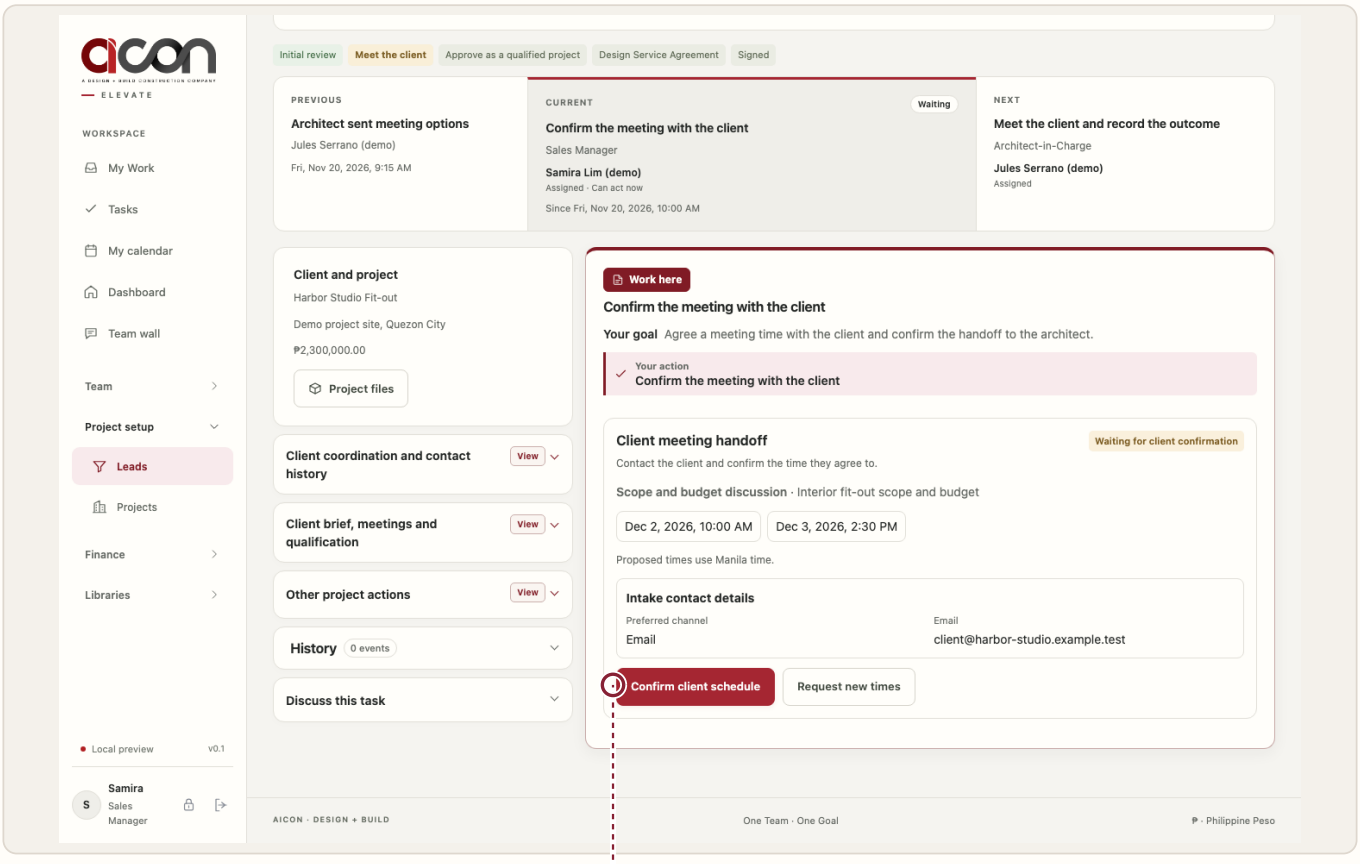
Use the Staff register to open the employee's record within your authorized HR appointment.

Return to guide ›

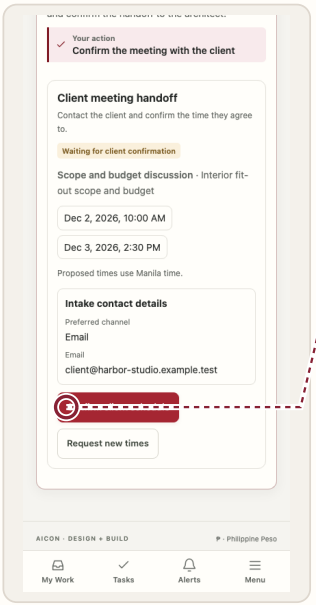
Sales Manager · Client meeting handoff

Check the proposed times and preferred contact channel before confirming the meeting.

DESKTOP



PHONE



Confirm the agreed meeting

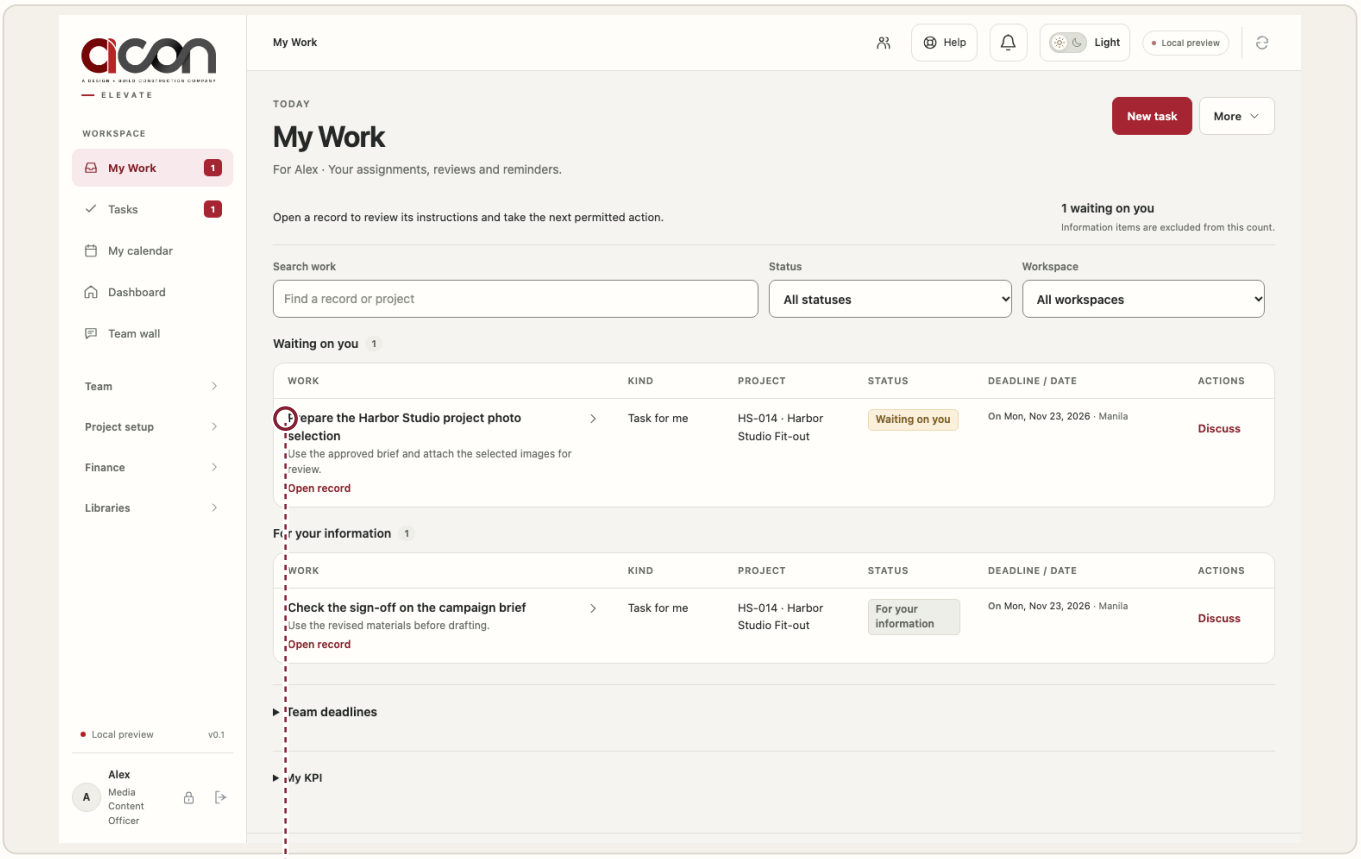
Contact the client first. Then choose the agreed time and record their confirmation through this action.

Return to guide ›

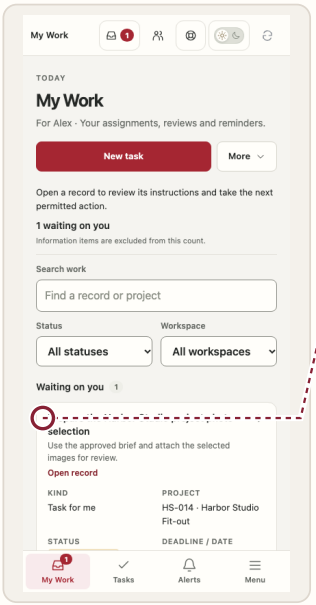
Media Content Officer · My Work

Open the assigned media brief from the queue to work on the deliverable.

DESKTOP



PHONE



Open the assigned media brief

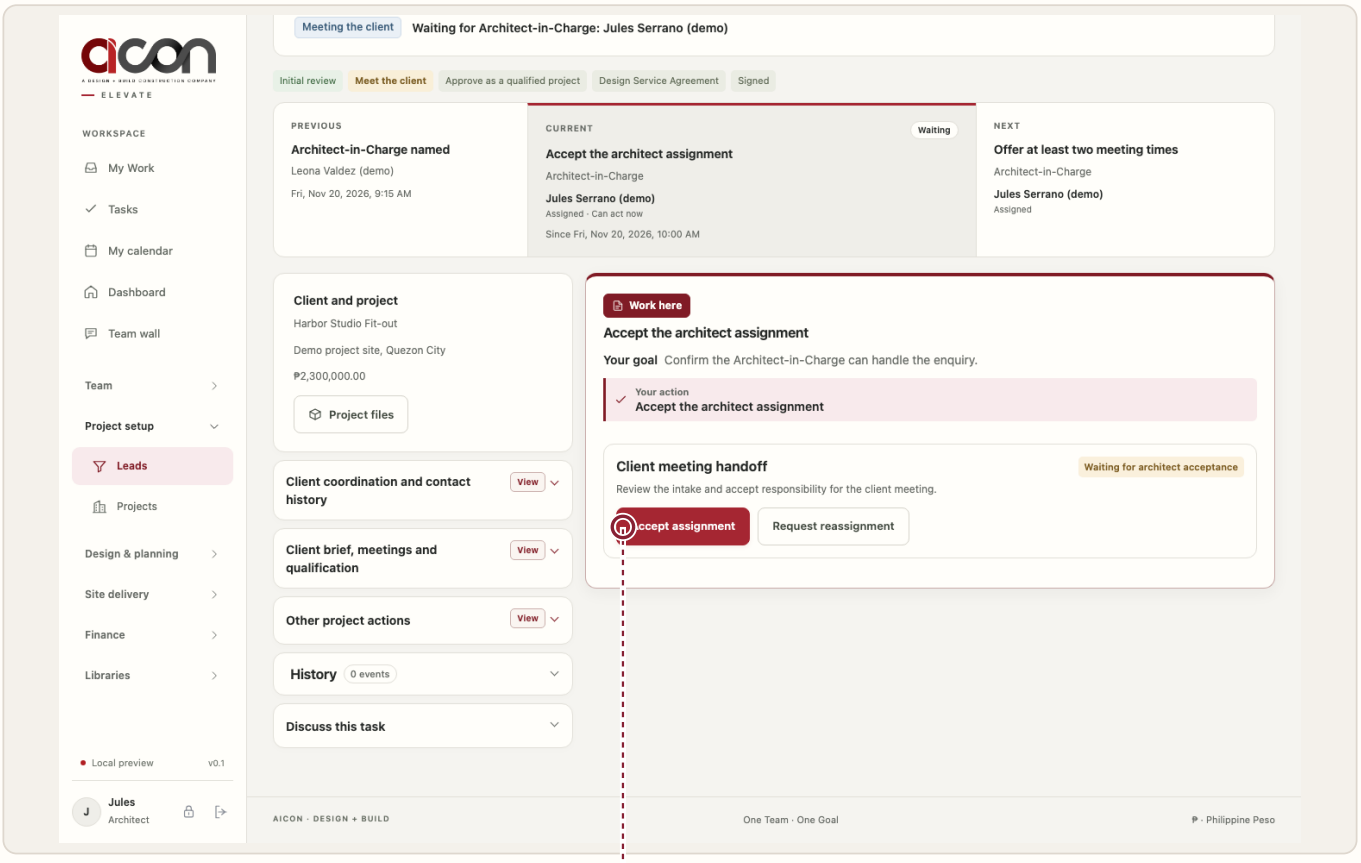
Select the task to see its brief, then attach the agreed deliverable to the same record.

Return to guide ›

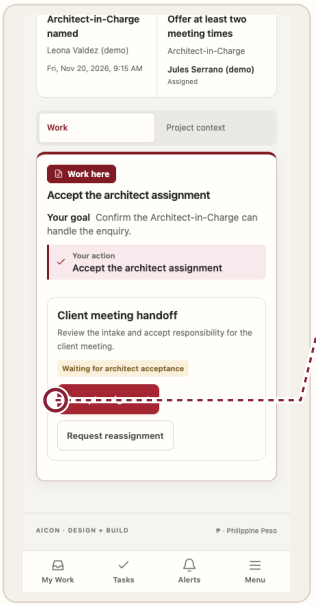
Architect-in-Charge · Accept assignment

Accept the intake assignment before sending available times to Sales.

DESKTOP



PHONE



Accept the assignment

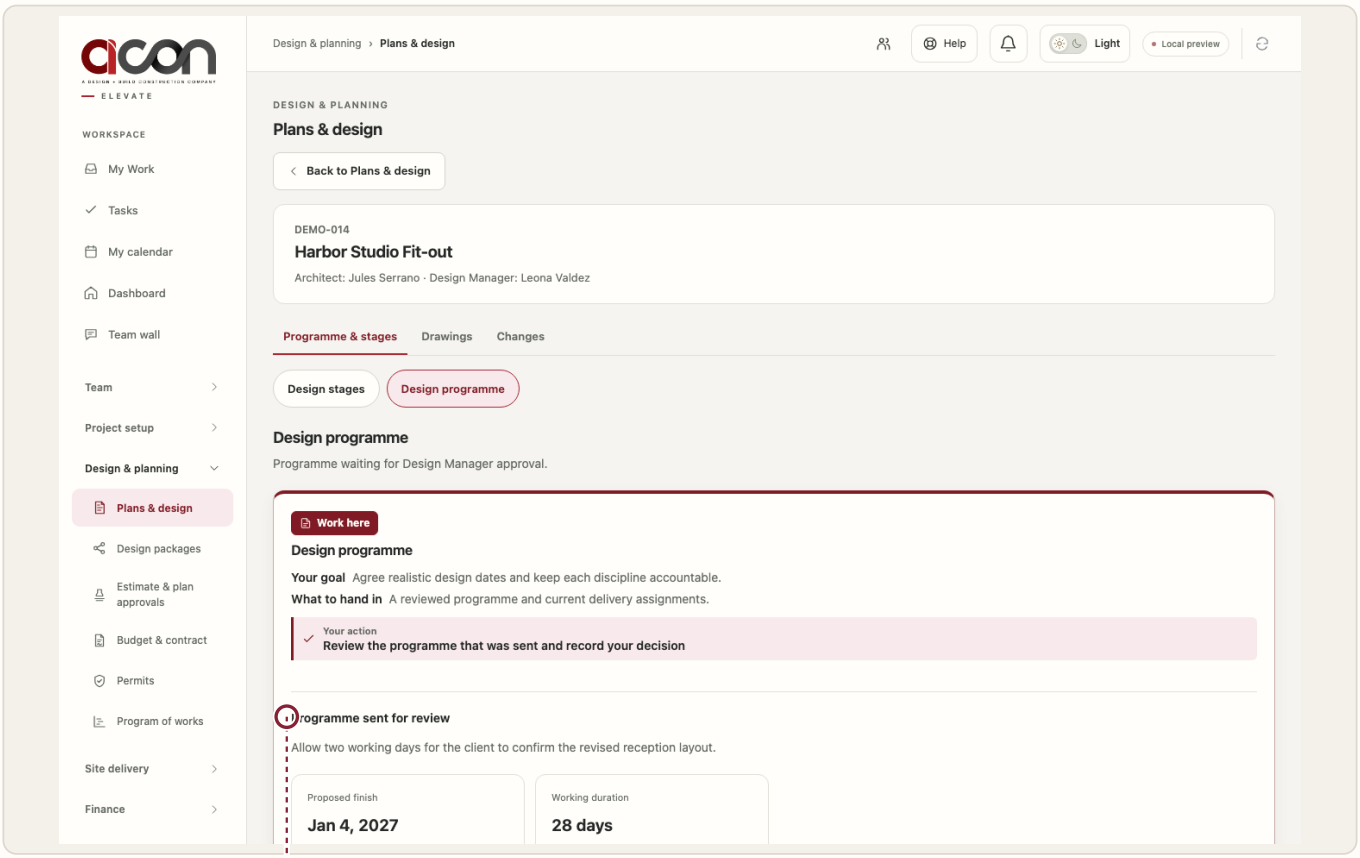
Accept only if you can take responsibility for this lead. The next action is to offer at least two available meeting times to Sales.

Return to guide ›

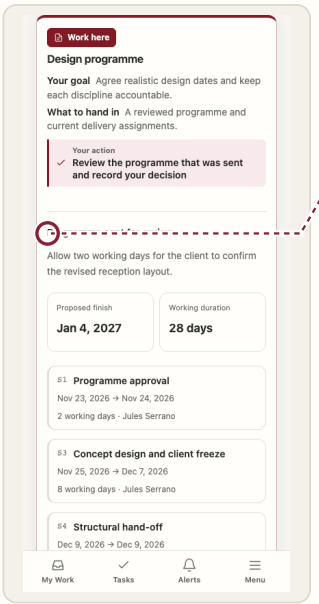
Design Manager · Programme sent for review

Check the submitted dates and activities before approving or returning the programme.

DESKTOP



PHONE



Check the submitted programme

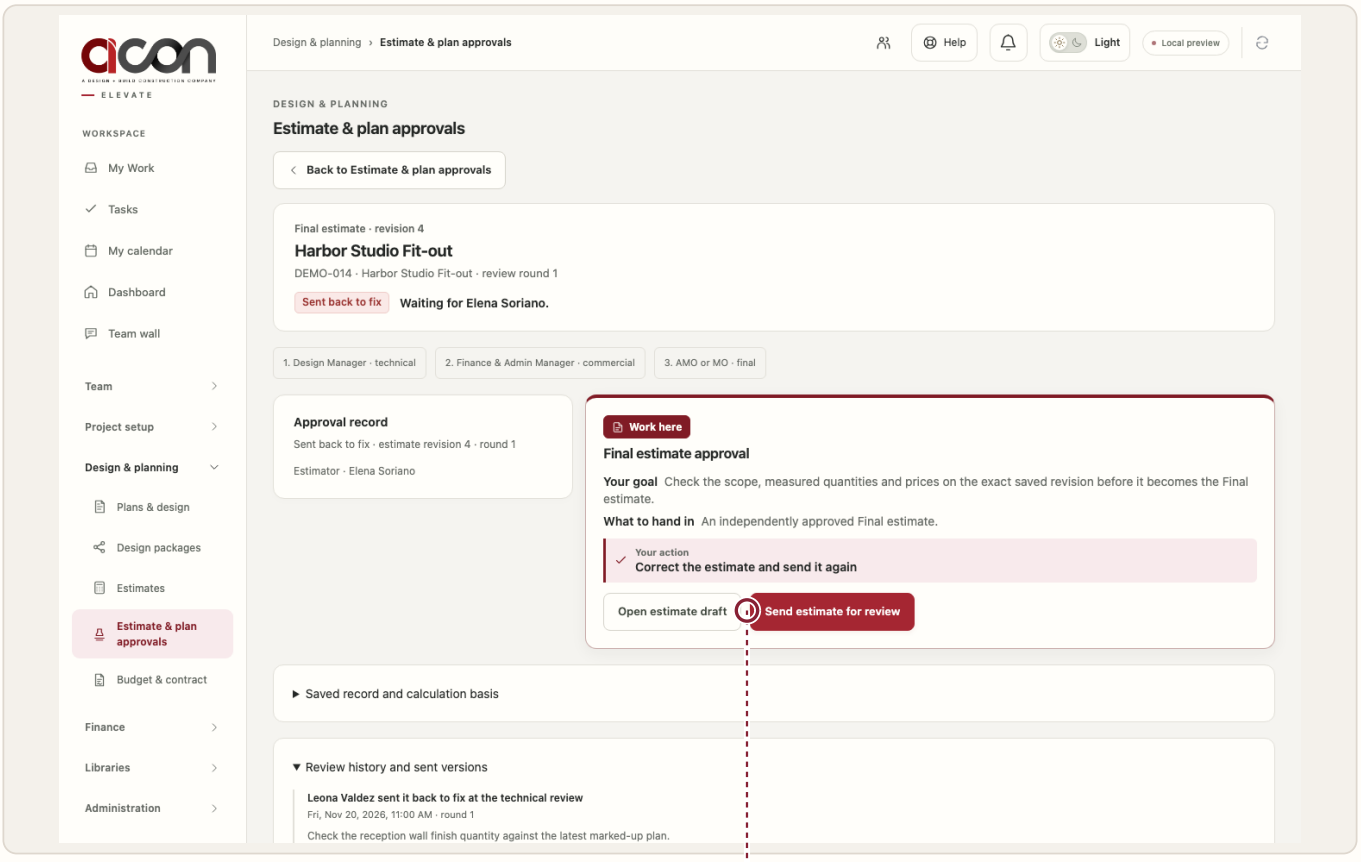
Review the submitted dates and dependencies here. Use the decision actions farther down to approve or send the exact proposal back.

Return to guide ›

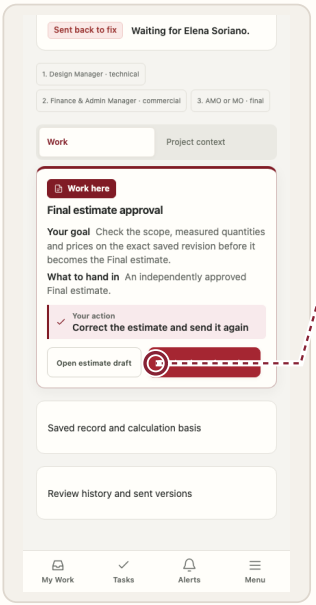
Estimator · Returned Final estimate

Open the estimate draft, read the review history and send your corrected version for review.

DESKTOP



PHONE



Send the corrected revision

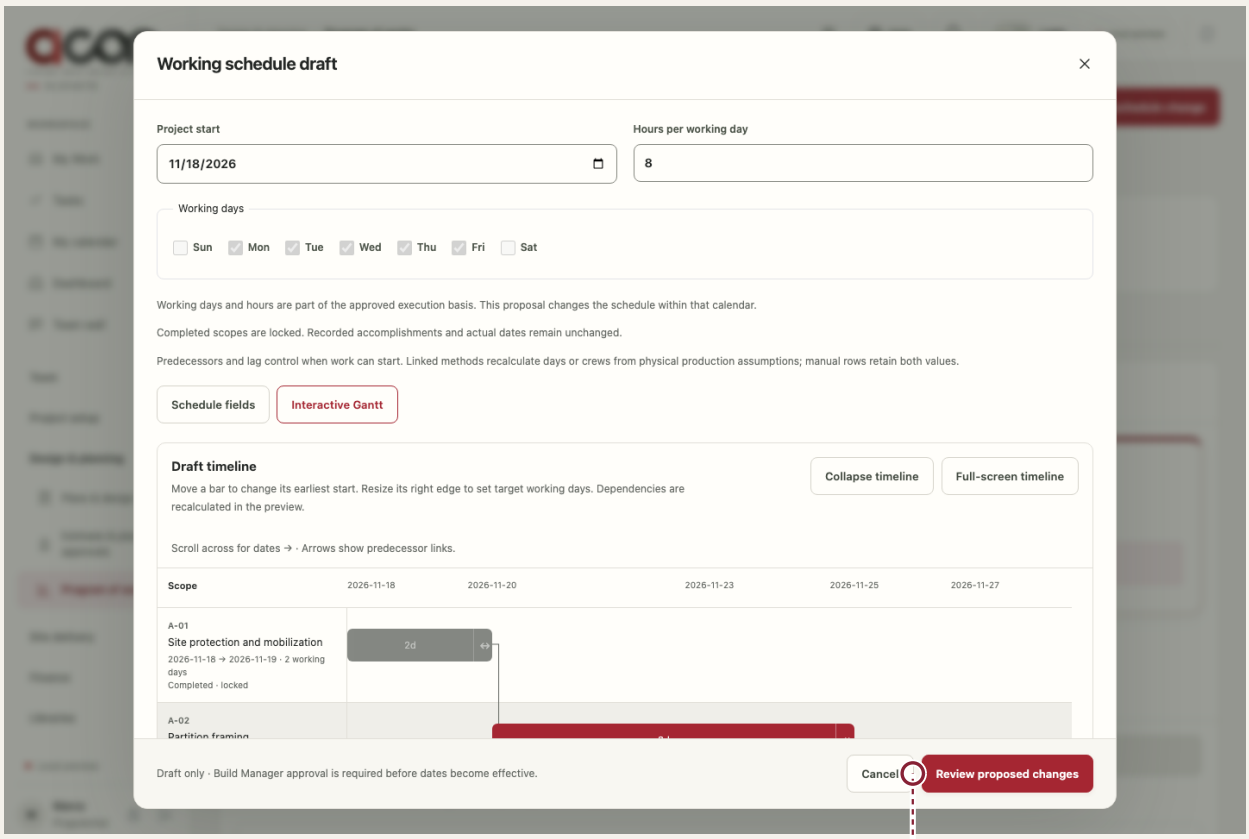
Open the estimate draft and address the recorded reason. Submit the corrected Final estimate for independent review.

Return to guide ›

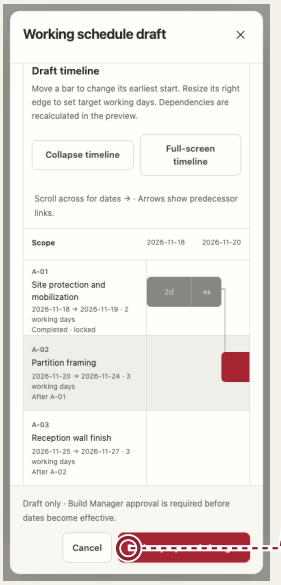
Programmer · Working schedule draft

Use the Interactive Gantt to propose changes while completed work stays locked.

DESKTOP



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Review the draft's impact

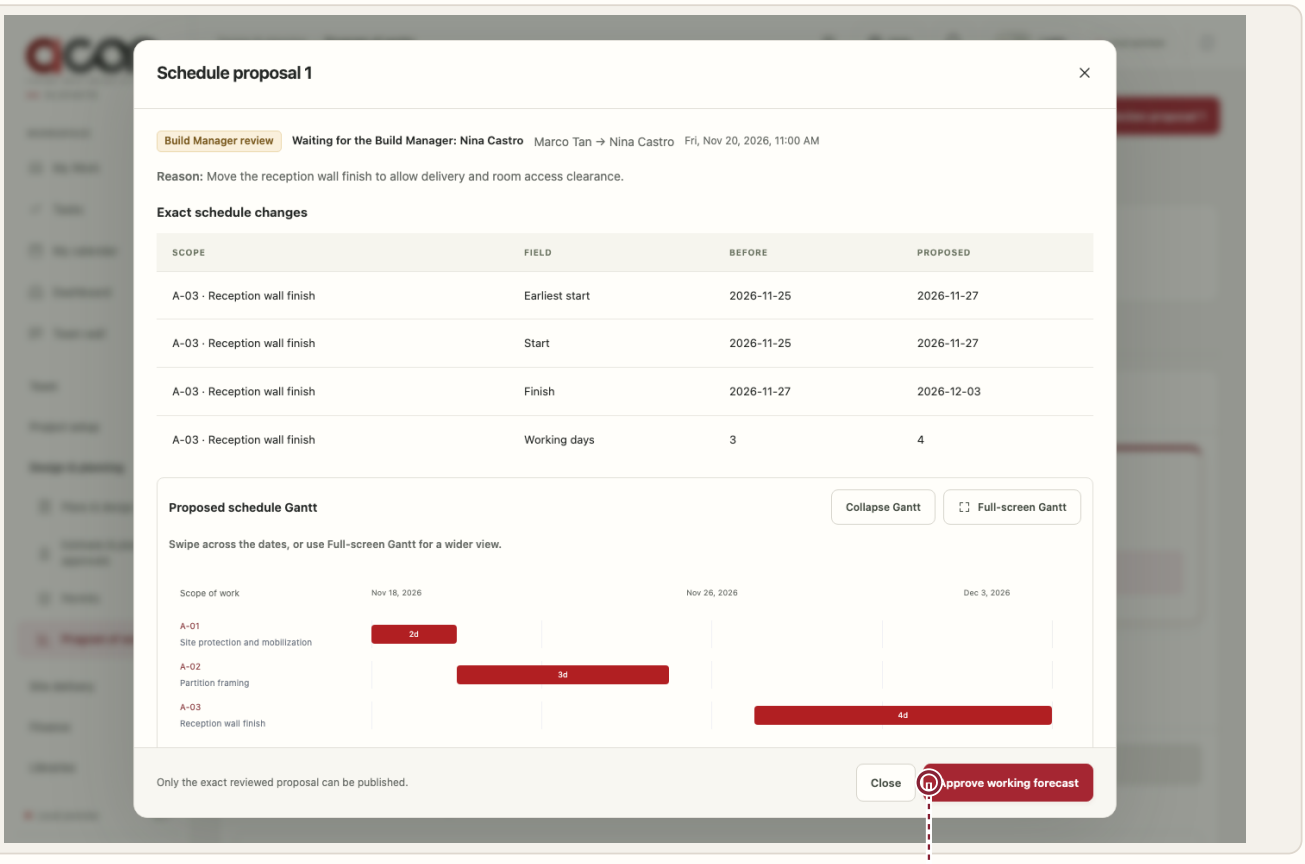
Use this after making schedule changes to check their effect before sending the proposal. Completed work stays locked.

Return to guide ›

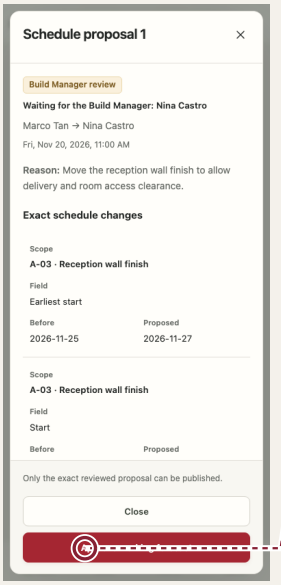
Build Manager · Review schedule proposal

Review exact schedule changes and planning impact before approving the working forecast.

DESKTOP



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Record the schedule decision

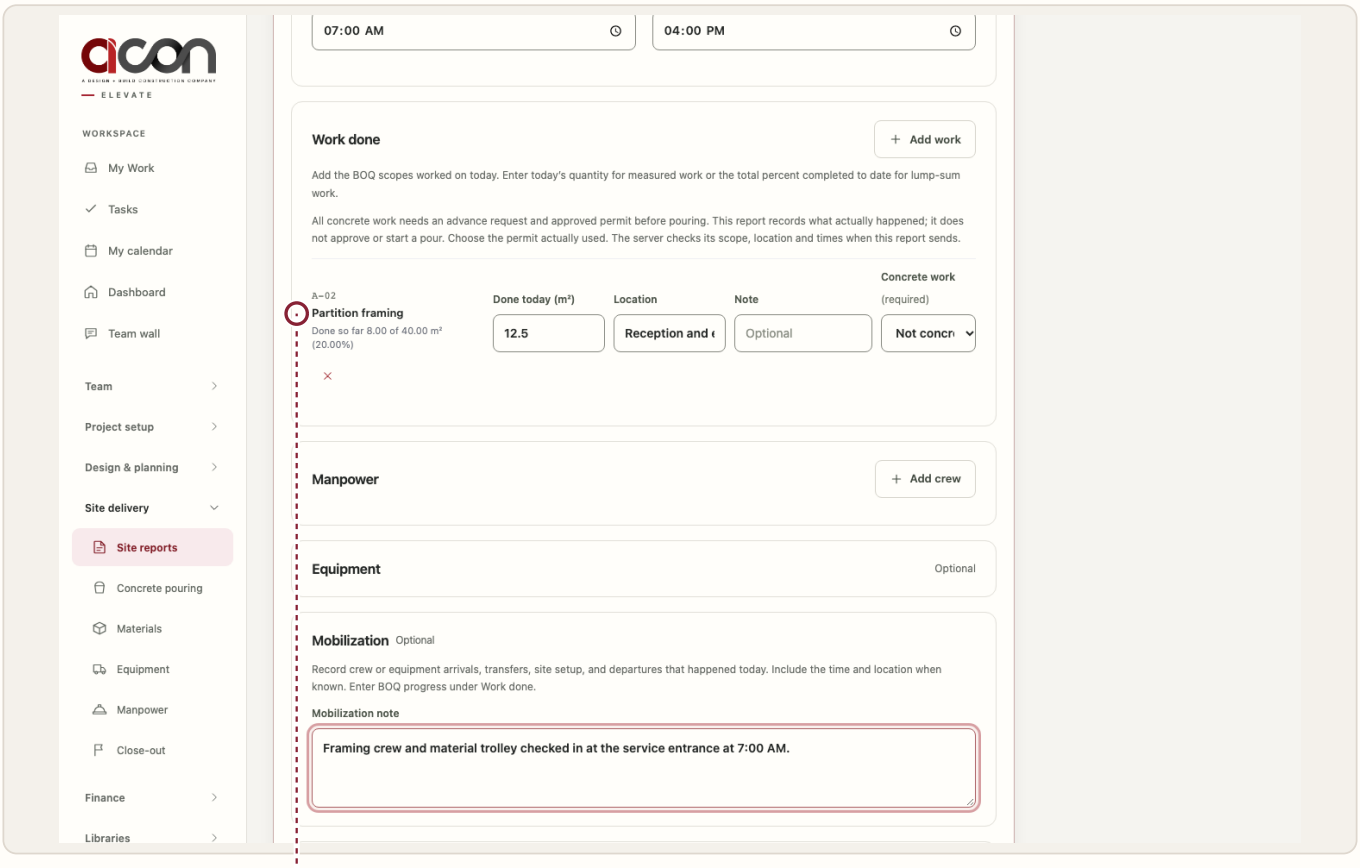
Review the exact changes and planning impact before approving the working forecast. Use Send back to request a correction.

Return to guide ›

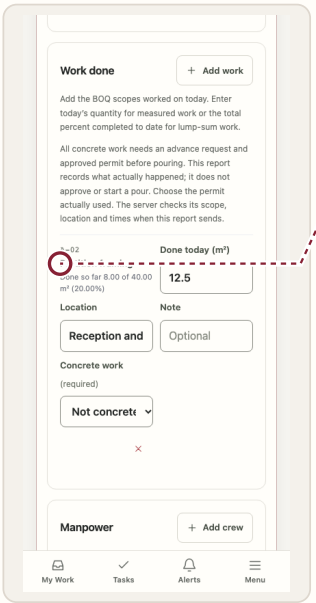
Project in Charge · Daily site report

Record the work actually performed and add evidence in the daily report.

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Select the actual scope of work

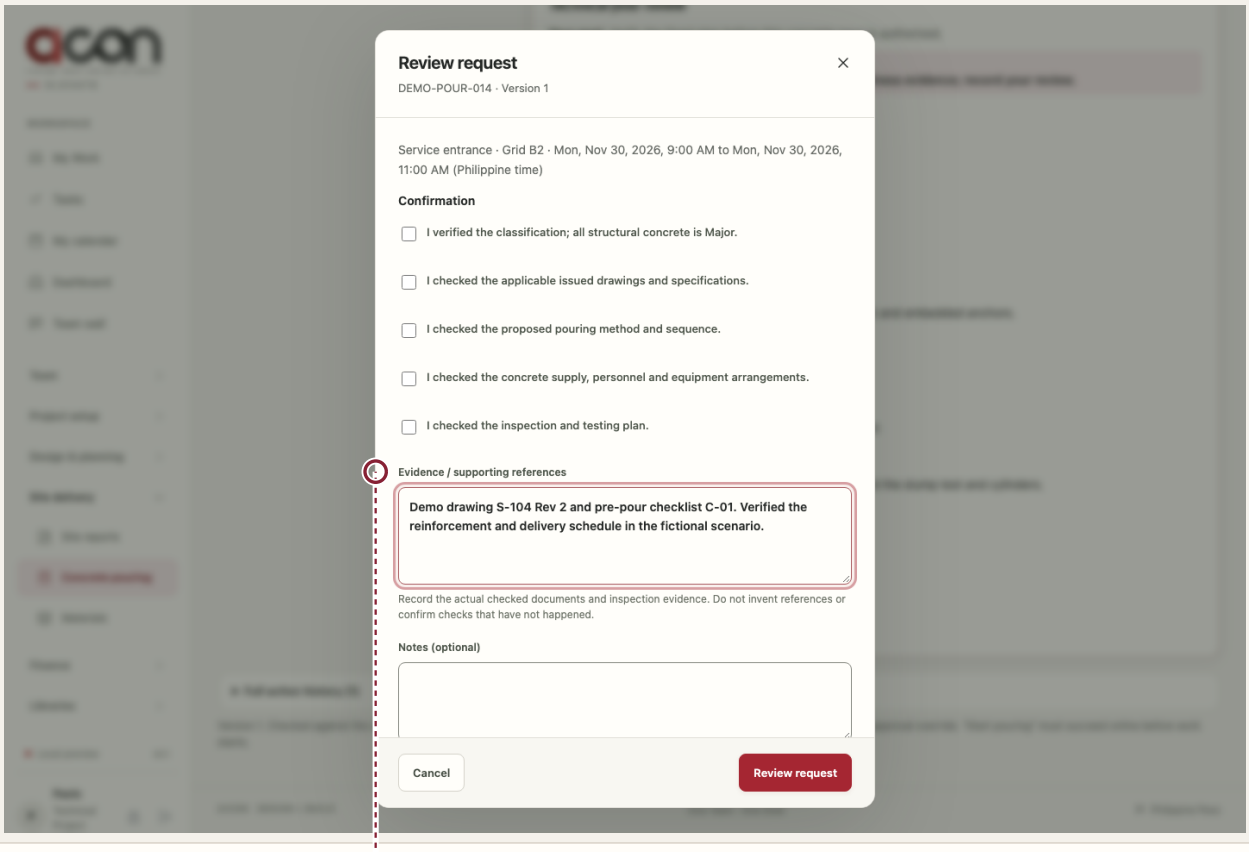
Choose the scheduled scope performed on site. Enter the actual work and quantities for that day and attach supporting evidence.

Return to guide ›

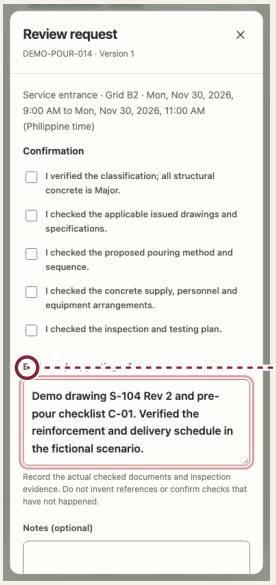
Technical Project Engineer · Concrete pour review

Check technical readiness and supporting evidence before the request goes to the Build Manager.

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Record the supporting evidence

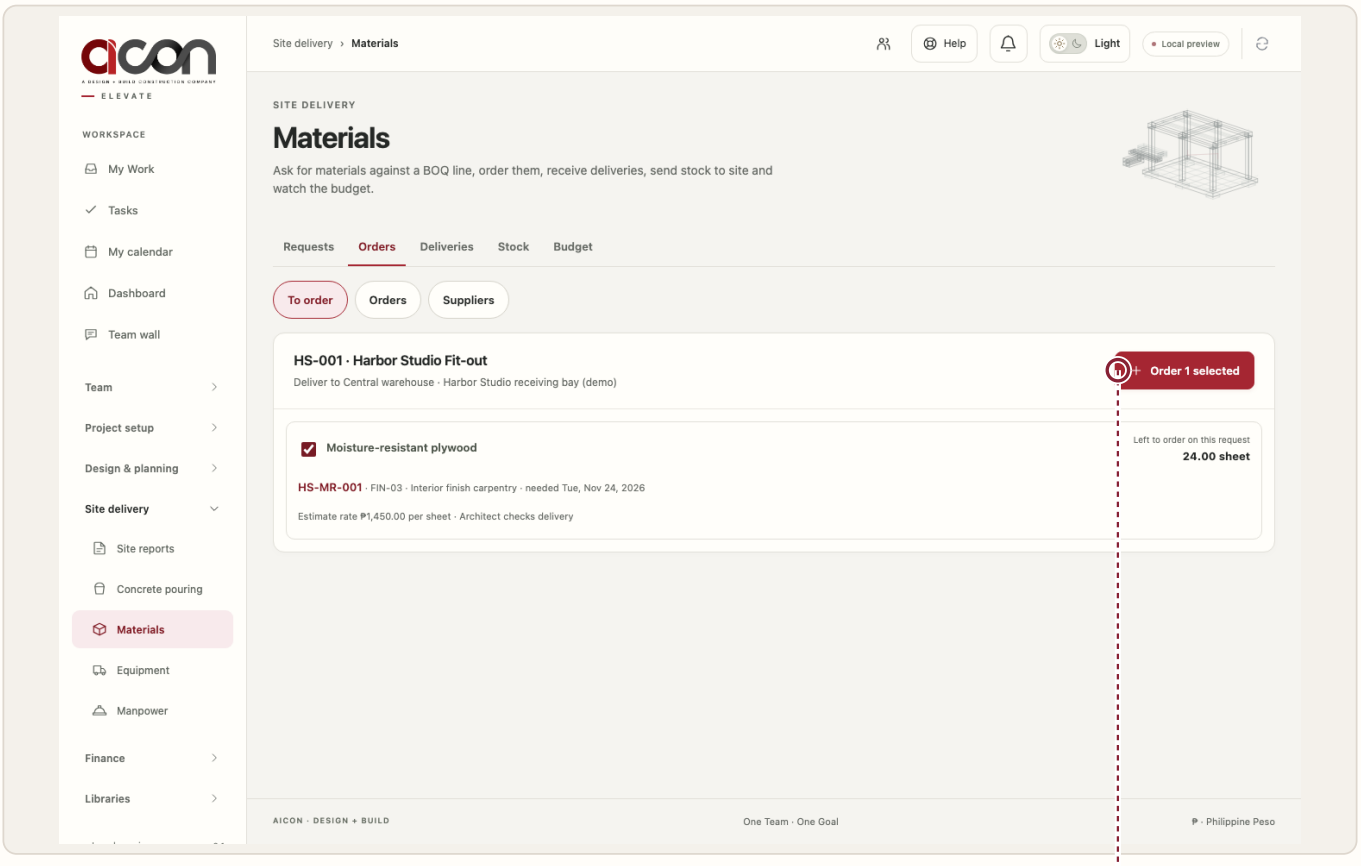
Check the issued drawings, method, resources and testing plan. Enter the actual references for the technical review here.

Return to guide ›

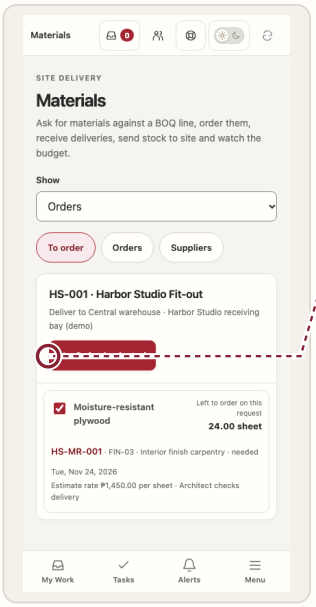
Procurement Officer · Approved material requests

See the BOQ work item, quantity and destination before selecting the request to order.

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Create an order from the selected scope

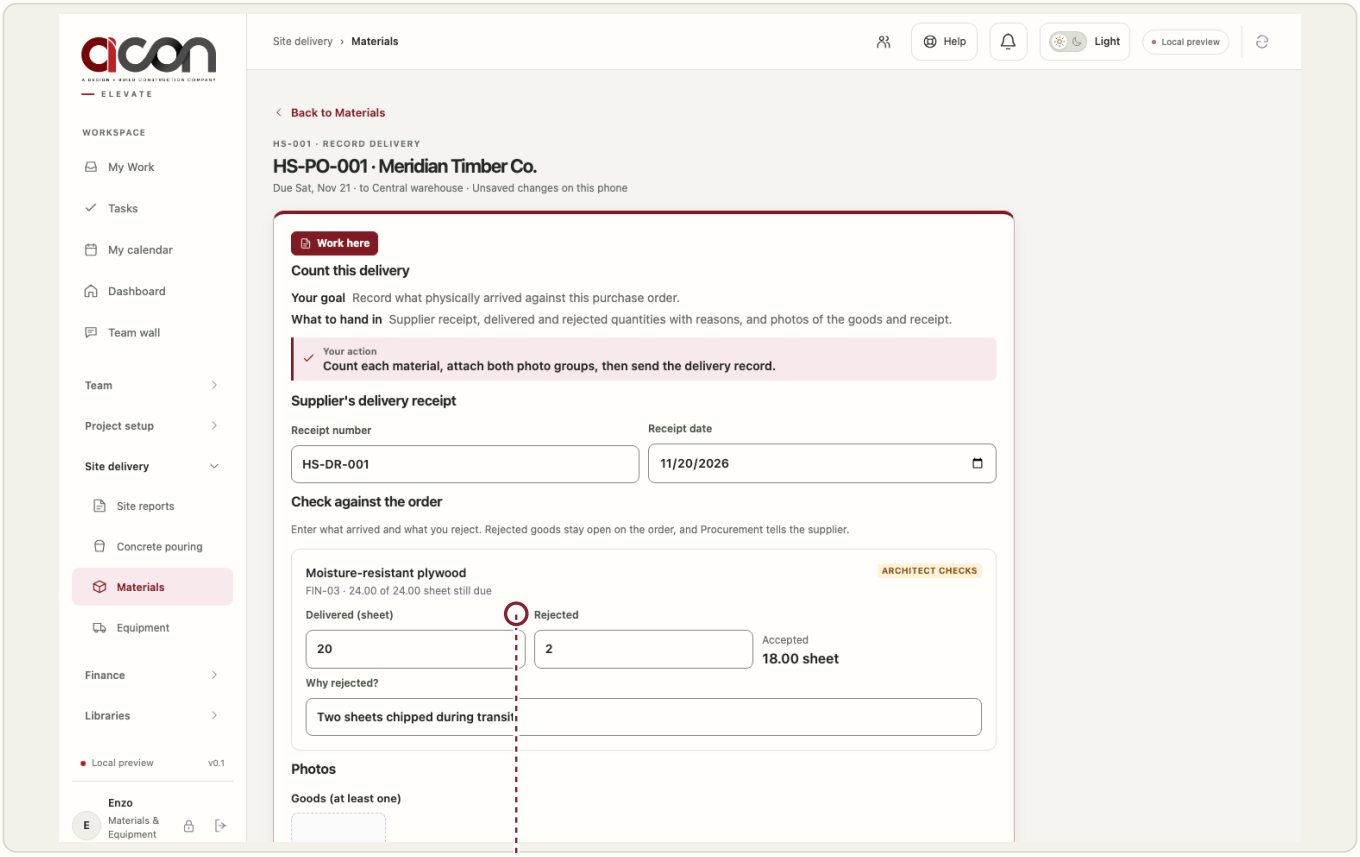
Check the BOQ line, approved quantity and destination before creating a purchase order from the selected request.

Return to guide ›

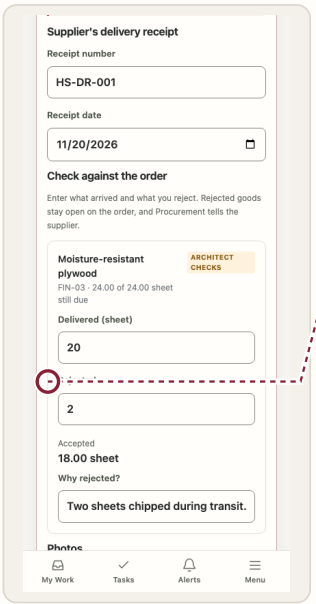
Materials & Equipment Officer · Receive an order

Enter delivered and rejected quantities and check the accepted count.

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Record rejected quantities

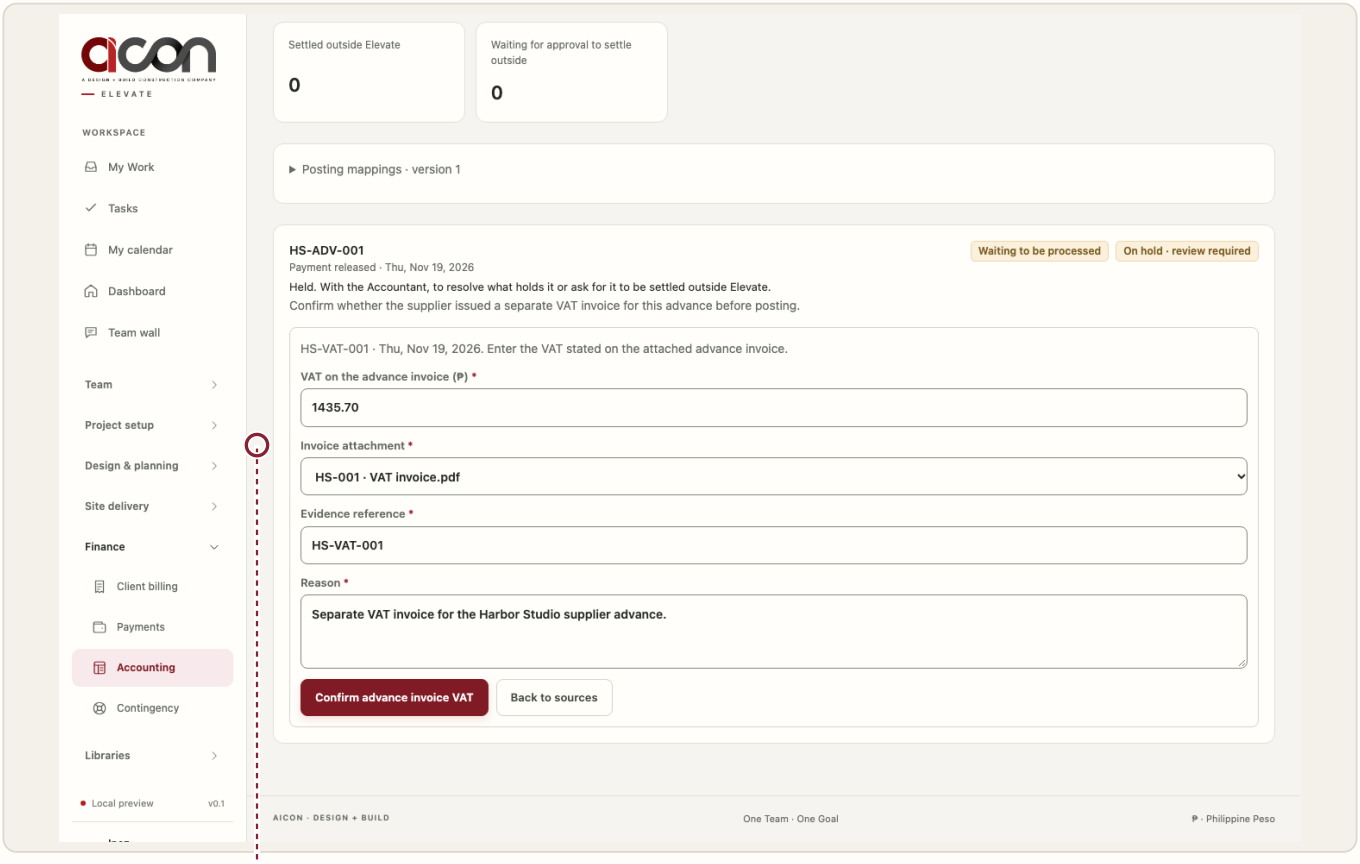
Count what arrived and enter any rejected quantity and its reason. Elevate calculates the accepted quantity from the counts.

Return to guide ›

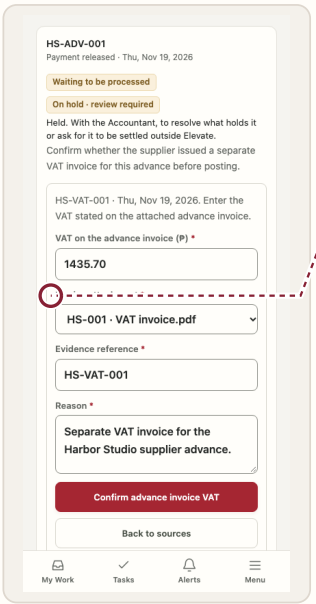
Finance & Admin Manager · Confirm advance VAT evidence

Select the matching, already-attached supplier advance VAT invoice and record the reason before confirming.

DESKTOP



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Select the VAT invoice evidence

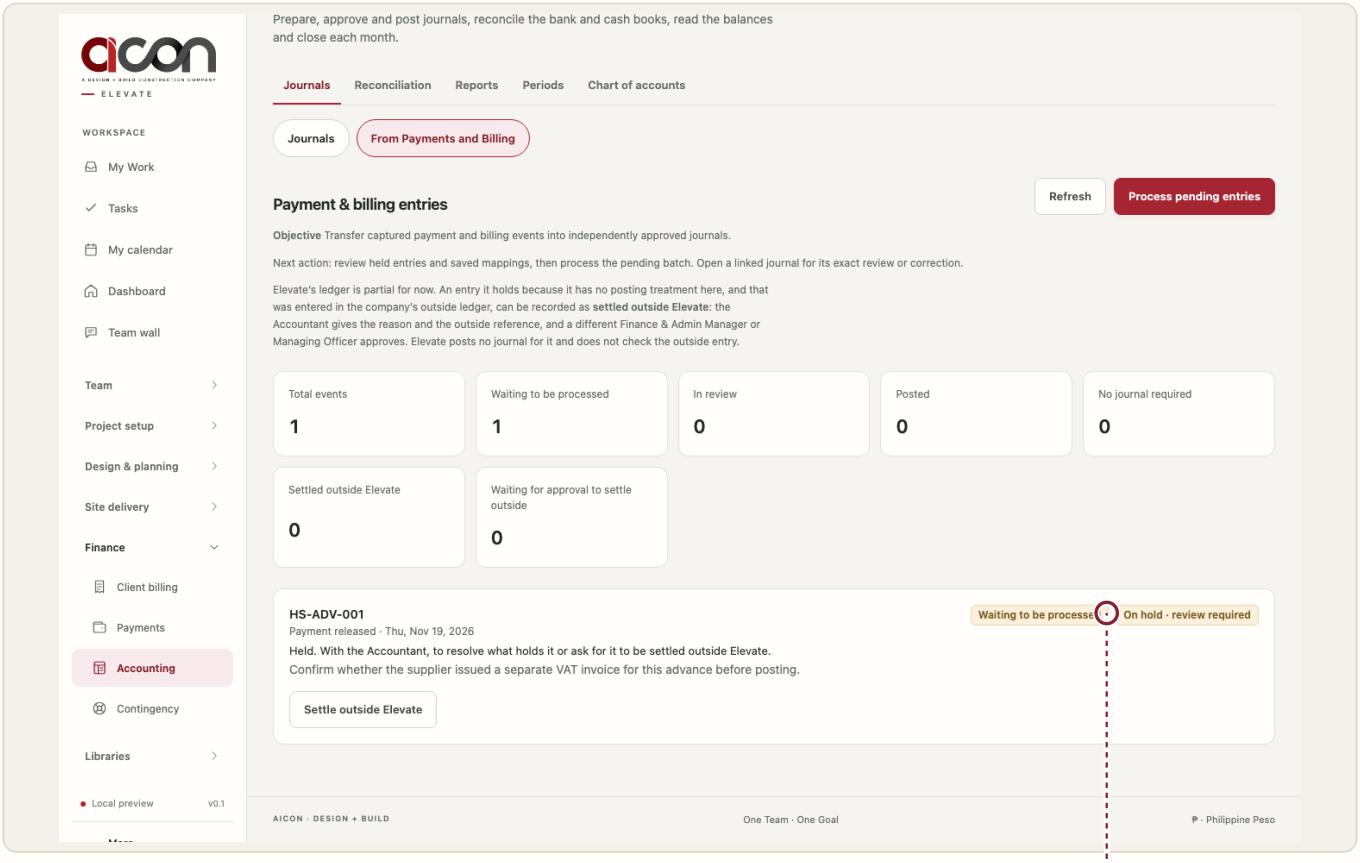
Choose the matching attached invoice, enter the VAT from that invoice and record the reason before confirming.

Return to guide ›

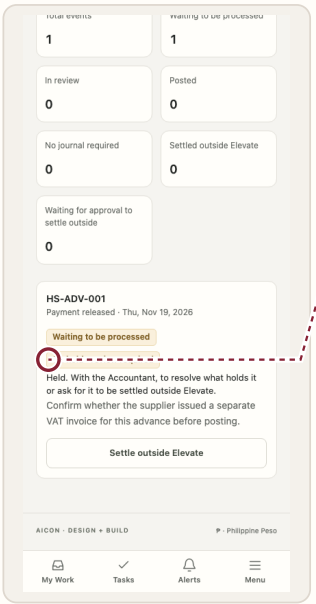
Accountant / Bookkeeper · Held billing and payment entry

Open the matching source and read why it is held. The fictional entry remains unposted.

DESKTOP



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Check why the entry is held

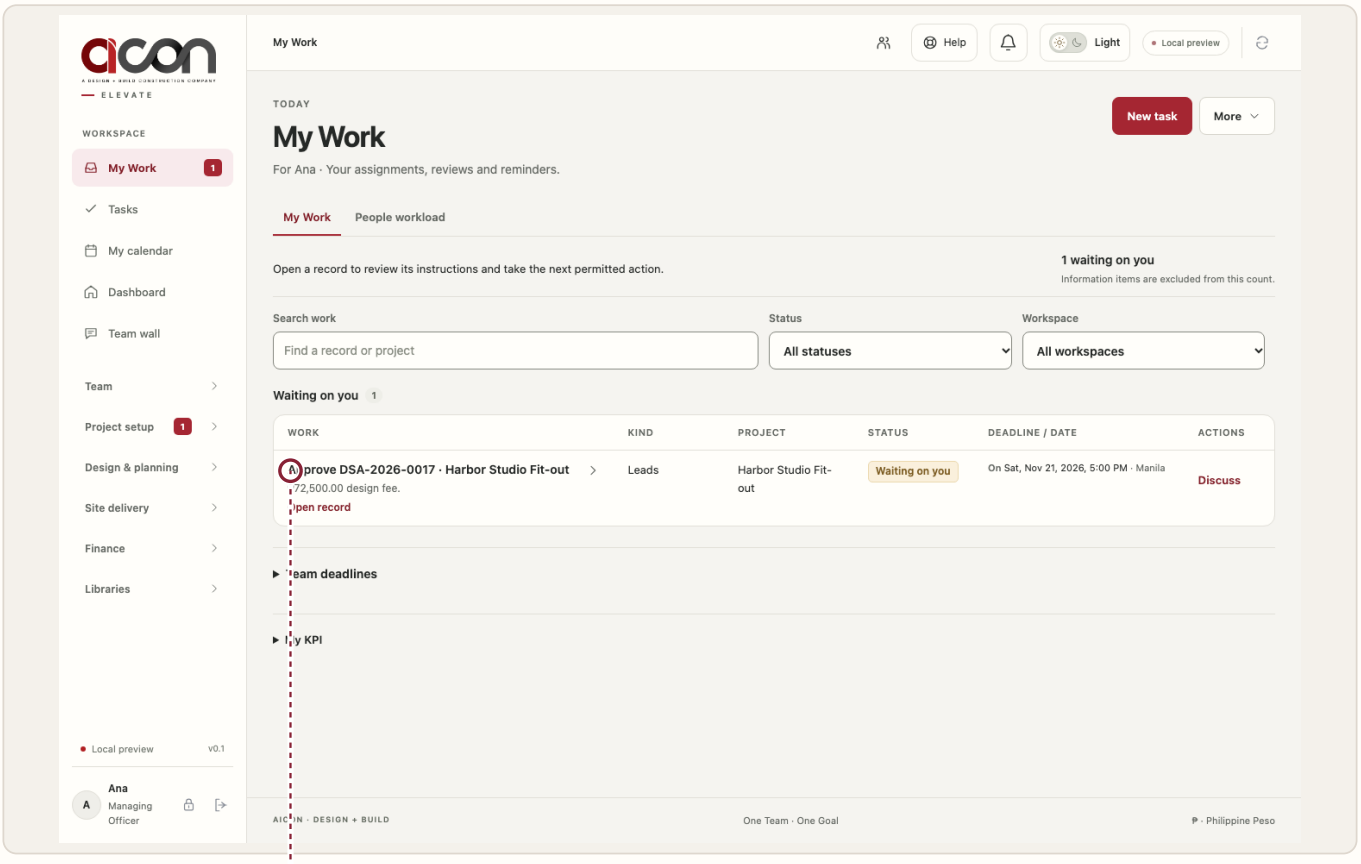
Read the source reason and gather its missing evidence. Keep the entry held until the applicable review is complete.

Return to guide ›

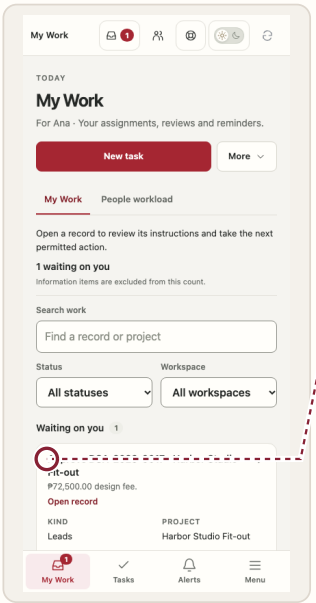
Managing Officer · DSA decision in My Work

Open the assigned decision to check the role, document and previous review.

DESKTOP



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Open the assigned DSA decision

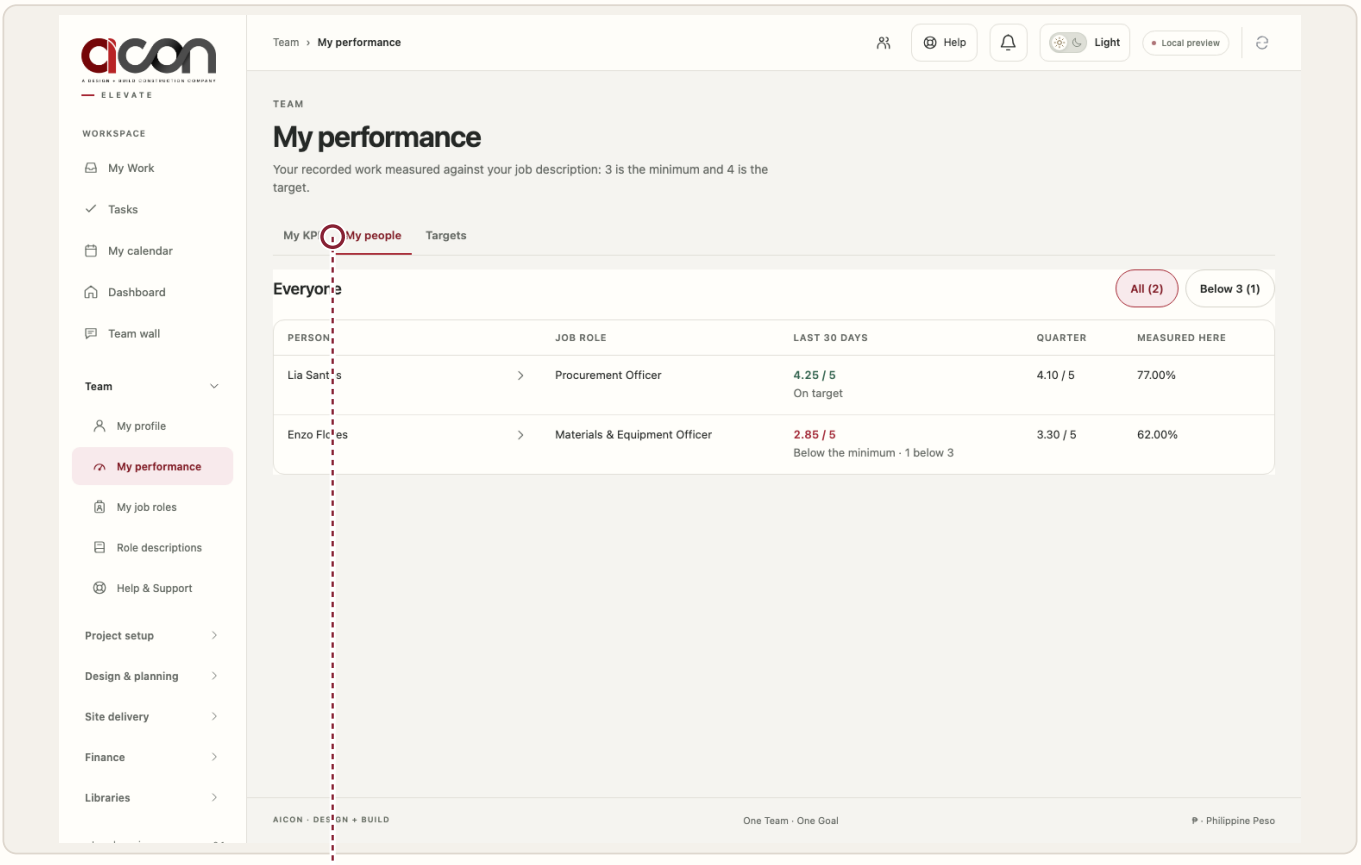
Review the exact agreement version and Finance's decision from My Work before making your independent decision.

Return to guide ›

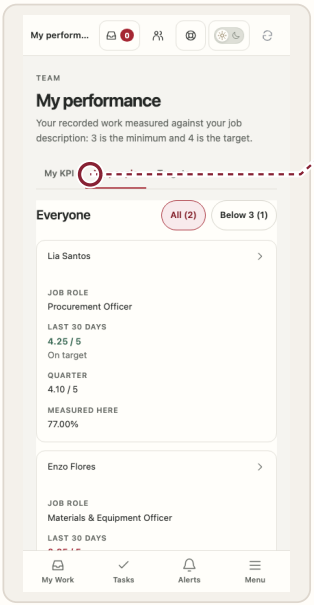
Assistant Managing Officer · My people

Use authorized company-wide performance and targets views to follow up on team work.

DESKTOP



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Review the permitted team's workload

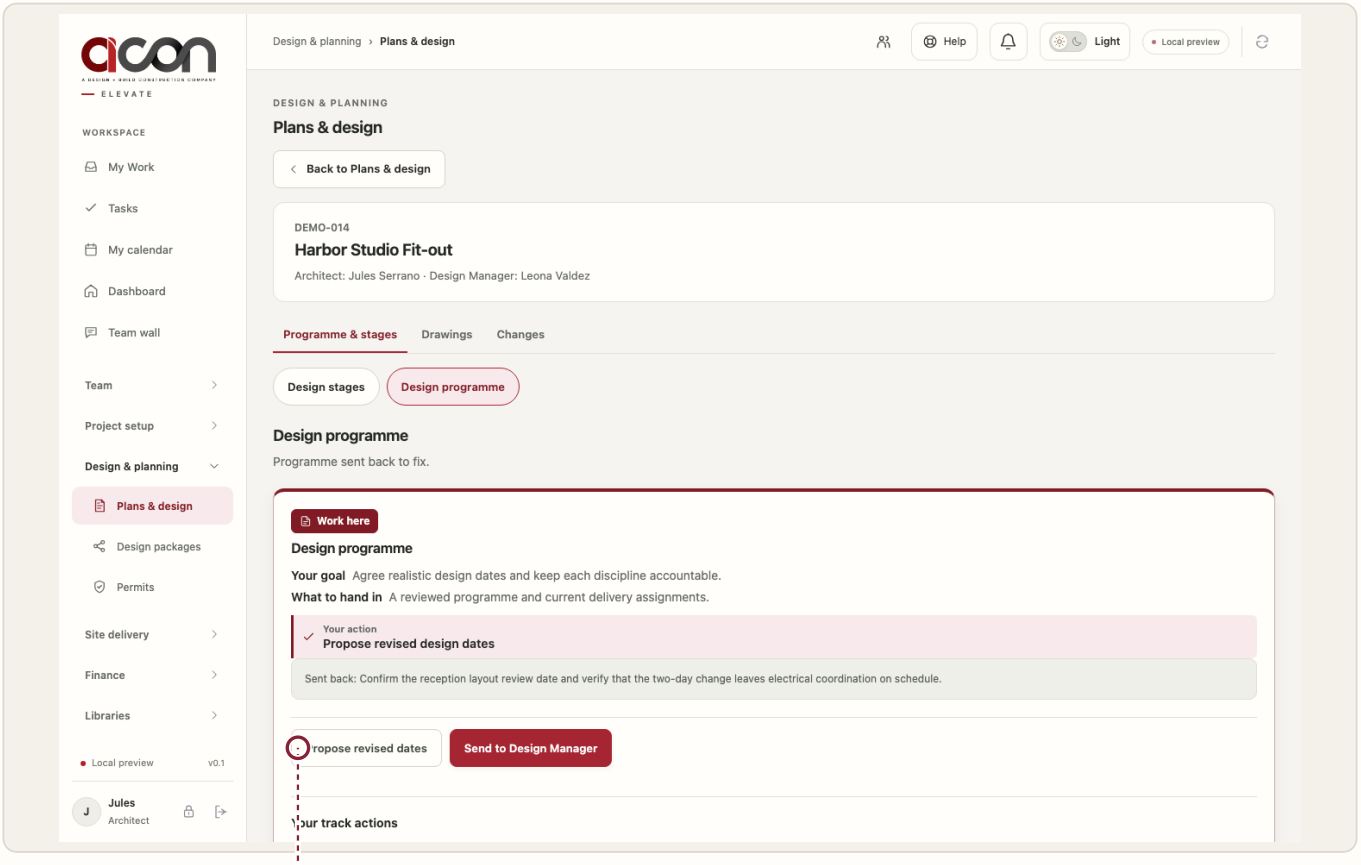
Open My people to review available measures and identify where to follow up. Use Targets only if your role allows it.

Return to guide ›

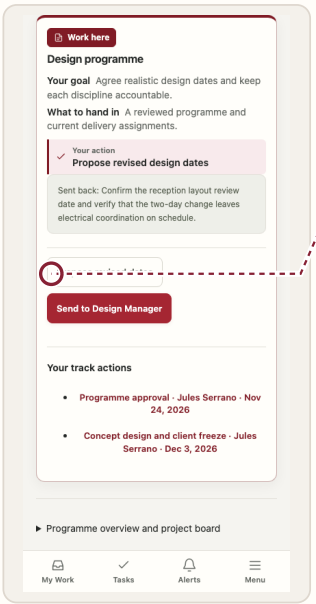
Returned programme in the architect’s workspace

The Architect-in-Charge sees the return reason and the action to prepare revised dates.

DESKTOP



PHONE



Start a revision

Read the return reason, then open Propose revised dates. Save a corrected proposal and send it back for review.

Return to guide ›