OS USER GUIDES

INTERNAL STAFF HELP CENTRE

ASI OS Onboarding

Welcome to the OS Onboarding. Choose the guide that fits the user type you are onboarding. Each section contains clear step-by-step instructions and tips for a smooth onboarding process.

Core & Non-Core Staff (end-to-end)

- Staff Type Definitions
- Core Staff: Permanent employees with long-term roles, typically working across multiple projects or centrally for ASI.
- Non-Core Staff: Fixed-term or project-based employees assigned to specific roles or assignments for a defined duration. </aside>
- Only P&T can manage this process.

Step 1: Issuing the Invitation

Responsible: P&T

Core / Non-Core selection is required in the Invitation Form under **Staff Type**.

- 1. Go to People Management > People Directory
- 2. Click "Onboard a New Core/Non-Core User"
- 3. Fill the Invitation Form:
 - Name
 - Personal Email
 - Staff Type: Core / Non-Core
 - o ASI Role
 - Location
- 4. Click **SUBMIT**
 - Link is emailed to the Core/Non-Core User (valid 24h)
 - If expired, P&T can resend via the user profile

Step 2: Invitation Email

- Responsible: Core/Non-Core User
- 1. Open personal email
- 2. Find "Welcome to Adam Smith International: Onboarding Email"
- 3. Click the magic link
- 4. You'll be directed to the onboarding page

Step 3: Entering Personal Information

- Responsible: Core/Non-Core User
- a. Personal Info
 - First/Last/Display Name
 - DOB, Marital Status, Gender
 - Nationality, Language

- ID Type & Number (Required)
- Travel/Health Insurance: Yes = upload required
- b. Contact Info
 - Current & Permanent Address
 - City, State, Zip, Country
 - Phone Numbers
 - Email (pre-filled)
- ▼ Check box if addresses match
- c. Upload Documents
 - ID (Front & Back) OR Passport (Mandatory)
 - Profile Picture (Optional)
- d. Create Signature
 - Draw or upload
 - Update anytime
 - Click NEXT

Step 4: Emergency & Health Info

Responsible: Core/Non-Core User

- a. Emergency Contact
- Blood Group (Required)
- b. Medical Declaration
 - Indicate health issues (If Yes, add details)
 - Doctor's Name + Contact (Required)
- c. Proof of Life
 - Choose & answer a security question
- d. Dependents (Optional)
 - Add names & relationships
- e. Next of Kin
- Name, Relationship, Contact Number
- → Click **NEXT**

Step 5: Upload Documents

Responsible: Core/Non-Core User

Required:

- Academic Certificates
- CV or Experience Letter

Optional:

- Professional Certificates
- Other Docs
- → Click **NEXT**

Step 6: Consent & References

Responsible: Core/Non-Core User

- a. Consent Forms
 - Sign:
 - Background Check Consent
 - Data Privacy Notice
 - Use + to expand, scroll, sign

b. References

- Add two referees (unique emails):
 - Email, Org Contact (Required)
 - Position (Optional)
- → Click **NEXT**

Step 7: Review & Submit

Responsible: Core/Non-Core User

- 1. Review info
- 2. Click Edit if needed
- 3. Click **Submit** when ready
- Emails sent to referees + P&T

Step 8: RDC Checks

- Responsible: P&T
- 1. Go to **People Directory**
- 2. Open the profile and click RDC Checks
- 3. Run checks via RDC System

If red flags:

- Clarify with Core/Non-Core
- Complete DD Form & send to Legal
- ✓ Mark as Approved & upload report
 - Only one check required
 - Upload the checks output result
 - Record who approved when is there.
 - Responsibility of approver to make sure all information is correct and complete.

Step 9: Final Verification

- ★ Responsible: P&T
 - Tick all onboarding verification boxes
 - I Once done, Issue Contract button appears

Step 10: Issue Contract

- **Responsible:** P&T
 - 1. Search for Core/Non-Core User in People Directory
- 2. Click Issue Contract
- 3. Complete form:
 - Contract Template: choose appropriate Core/Non-Core template
 - Type: Permanent
 - o Start Date, Line Manager
 - o Location, Salary, Allowances, etc.

Optional: Send for Review

- Toggle: Send Contract for Review
- Add reviewers
- Save Draft > appears under My Approvals > Contract Review

Assign Signatory or Self-sign

- P&T assigns signatory or signs directly
- Line Manager signs after the ASI Signatory if applicable

Contract sent to ASI Signatory first, then Core/Non-Core User

Step 11: Signing the Contract

- **Responsible:** Core/Non-Core User
 - 1. Open email: "Sign Contract and Complete Your Onboarding"
 - 2. Click the magic link
 - 3. Sign forms:
 - Ethics Declaration
 - Conflict of Interest
 - Expression of Wish
 - Add Bank Details
- 4. Review & sign contract
- 5. Click I Agree & Submit
- Save Microsoft login details!

Step 12: Finalising Onboarding

- **Responsible:** Core/Non-Core User
 - 1. Select Login with Microsoft 365
- 2. Setup Authenticator App
- 3. Login with ASI email (primary), personal (backup)
- Notifications sent to P&T, Service Desk, Line Manager

Onboarding Complete!

Associate Consultants (end-to-end)

- Staff Type Definitions
 - Associate Consultant

Independent consultants contracted directly by ASI to provide expert services on a short-term or task-specific basis. They are **not ASI employees**, but work under a signed contract for a defined scope and period.

1 Note: Only the **Project Team** (PD, PM and AM) can carry out this process.

Step 1: Issuing the Invitation

- Responsible: Project Team
 - 1. Navigate to the OS and go to the left-hand menu.
- 2. Click **People Management > People Directory**
- 3. Click the "Onboard a New User" button.
- 4. Complete the **Invitation Form** with the following fields:
 - Name: Enter the full name of the user.
 - Personal email address: This will be used to send the onboarding link.
 - Staff Type: Select Associate Consultant.
 - ASI Role: Associate Consultant is pre-populated.
 - Location: This will influence payment and should be selected accurately.
- 5. Click SUBMIT.

- An onboarding link is emailed to the user. This link is valid for 24 hours.
- If the link expires, OS Support Team, IT team, Layth, Adrian can resend it by accessing the user's profile and clicking "Resend Invitation".

Step 2: User Receives Invitation Email

- 📌 Responsible: User Associate Consultant
 - 1. Open your personal email inbox.
- 2. Find the email titled "Welcome to Adam Smith International: Onboarding Email".
- 3. Click the **magic link** in the email.
- 4. You will be redirected to the ASI OS Onboarding Page.

Step 3: Entering Personal Information

- Responsible: User Associate Consultant
- a. Personal Info
 - First/Last/Display Name
 - DOB, Marital Status, Gender
 - Nationality, Language
 - ID Type & Number (Required)
 - Travel/Health Insurance: Yes = upload required
- b. Contact Info
 - Current & Permanent Address
 - · City, State, Zip, Country
 - Phone Numbers
 - Email (pre-filled)
- Check box if addresses match
- c. Upload Documents
 - ID (Front & Back) OR Passport (Mandatory)
 - Profile Picture (Optional)
- d. Create Signature
 - Draw or upload
 - Update anytime
 - Click NEXT

Step 4: Emergency and Health Information

- Responsible: User Associate Consultant
- a. Emergency Contact
 - Add **Blood Group** (Mandatory)
- b. Medical Declaration
 - Indicate whether you have any underlying health issues (Mandatory)
 - o If **Yes**, a field will appear to describe the condition
 - Provide Primary Doctor's Name and Contact Number
- c. Proof of Life
 - Choose one **security question** from the list
 - Provide an **answer** you will remember (Both fields are mandatory)
- d. Add Dependents (Optional)

- Click "Add another dependent" if applicable
- Fill in the details for each dependent
- e. Next of Kin / Emergency Contact
 - Full Name (Mandatory)
 - Relationship (e.g., parent, spouse, friend)
 - Contact Number (valid phone number)
- → Click **NEXT**

Step 5: Upload Supporting Documents

Responsible: User Associate Consultant

Upload the following documents:

Required:

- Academic Certificates (PDF/JPEG)
- CV or Experience Letter

Optional:

- Professional Certificates
- Any other relevant documents
- → Click NEXT

Step 6: Consent Forms & References

- 📌 Responsible: User Associate Consultant
- a. Background Checks & Data Privacy
 - Two mandatory forms must be signed:
 - Background Verification Consent
 - Data Privacy Notice
 - Click the + symbol to open each form
 - Read the content and scroll to the bottom to click "Sign this"

b. References

- Enter details for two referees:
 - Email Address (Required)
 - Organisation Contact (Required)
 - Position & Organisation (Optional)
- I Each referee must have a unique email
- → Click **NEXT**

Step 7: Review & Submit

📌 Responsible: User Associate Consultant

- 1. Carefully review all sections of your onboarding profile
- 2. Click "Edit" to make corrections
- 3. Click "Submit" when everything is correct
- Reference emails are sent M A verification request is sent to

service.desk@adamsmithinternational.com

Step 8: Review and RDC Checks

- Responsible: Service Desk (Eliza)
 - 1. Go to **People Management > People Directory**
- 2. Filter profiles awaiting verification
- 3. Open the user profile and click "RDC Checks"
- 4. The RDC tool opens: RDC Login

If red flags appear:

- Request clarifications from the user
- Complete a **Due Diligence Clearance Form**
- Send it to **Legal** for review
- Once cleared, mark the user as **Approved** in the system and upload the RDC report

Step 9: Final Verification Checklist

- **Responsible:** Project Team
 - Tick all verification checkboxes in the user's profile
 - Once complete, the "Issue Contract" button will appear

Step 10: Issue Contract

- **Responsible:** Project Team
- 1. In **People Directory**, search and open the user's profile
- 2. Click "Issue Contract"
- 3. Fill out the form:
 - Contract Template: Adviser Template (mandatory)
 - Contract Type: Fixed Term (select from dropdown)
 - Start Date
 - End Date
 - Line Manager (select from dropdown)
 - Principal Work Location
 - Project (select from dropdown)
 - Daily rate (if payment is fixed, monthly or on deliverables please specify in Special Conditions Box or ToR - this will be managed through an Output Log)
 - Upload Term Sheet/Coversheet if needed
 - Upload a ToR (either type/paste in text or upload JPEGs)
 - Edit Schedule 1 section
 - Specify any Special Conditions
- 4. Optional: Send for Review
 - Toggle: Send Contract for Review
 - Add reviewers
 - Save Draft > appears under My Approvals > Contract Review
- 5. Assign Signatory or Self-sign
 - Project Team assigns signatory (usually Project Director) or signs directly
- 6. Contract sent to ASI Signatory first, then **User Associate**Consultant

Step 11: Consultant Signs & Submits

- Responsible: User Associate Consultant
 - 1. Open the email titled "Sign Contract and Complete your Onboarding"
 - 2. Click the magic link
 - 3. Sign these **forms**:
 - Ethics & Compliance Declaration

- Conflict of Interest Declaration
- Expression of Wish (it's optional for Associate Consultants)
- 4. Provide Bank Details
- 5. Review the contract, scroll through the cover sheet and full content
- 6. Click "Sign this"
 - You can update your signature if needed
- 7. Click "I agree & submit"
- **f** Final screen displays **Microsoft login credentials** save these!

Step 12: Final Login

- Responsible: User Associate Consultant
- 1. Select "Complete Onboarding using Microsoft 365 credentials"
- 2. Set up the **Microsoft Authenticator app** for secure login
- 3. Login is now enabled via:
 - ASI email (primary login)
 - Personal email (backup contact)
- You now have full access to the OS.
- Notifications are sent to **Service Desk**, and the Line Manager **Onboarding Complete!**

Associates working through their own company (end-to-end)

- Staff Type Definitions
- Associate Consultant

An Associate Consultant working through their own company is an independent consultant contracted directly by ASI to provide expert services on a short-term or task-specific basis. They are not ASI employees, but operate under a signed contract for a defined scope and period. They use their registered company for tax purposes, submitting invoices through their business entity rather than as individuals.

1 Note: Only the **Project Team** (PD, PM and AM) can carry out this process.

Step 1: Issuing the Invitation

- Responsible: Project Team
 - 1. Navigate to the OS and go to the left-hand menu.
- 2. Click **People Management > People Directory**
- 3. Click the "Onboard a New User" button.
- 4. Complete the **Invitation Form** with the following fields:
 - Name: Enter the full name of the user.
 - Personal email address: This will be used to send the onboarding link.
 - Staff Type: Select Associate Consultant.
 - ASI Role: Associate Consultant is pre-populated.
 - Location: This will influence payment and should be selected accurately.

- 5. Click SUBMIT.
 - An onboarding link is emailed to the user. This link is valid for 24 hours.
 - If the link expires, OS Support Team, IT team, Layth, Adrian can resend it by accessing the user's profile and clicking "Resend Invitation".

Step 2: User Receives Invitation Email

- Responsible: User Associate Consultant
 - 1. Open your personal email inbox.
- 2. Find the email titled "Welcome to Adam Smith International: Onboarding Email".
- 3. Click the **magic link** in the email.
- 4. You will be redirected to the ASI OS Onboarding Page.

Step 3: Entering Personal Information

- 📌 Responsible: User Associate Consultant
- a. Personal Info
 - First/Last/Display Name
 - DOB, Marital Status, Gender
 - Nationality, Language
 - ID Type & Number (Required)
 - Travel/Health Insurance: Yes = upload required
- b. Contact Info
 - Current & Permanent Address
 - City, State, Zip, Country
 - Phone Numbers
 - Email (pre-filled)
- Check box if addresses match
- c. Upload Documents
 - ID (Front & Back) OR Passport (Mandatory)
 - Profile Picture (Optional)
- d. Create Signature
 - Draw or upload
 - Update anytime
 - Click NEXT

Step 4: Emergency and Health Information

- Responsible: User Associate Consultant
- a. Emergency Contact
 - Add **Blood Group** (Mandatory)
- b. Medical Declaration
 - Indicate whether you have any underlying health issues (Mandatory)
 - If **Yes**, a field will appear to describe the condition
 - Provide Primary Doctor's Name and Contact Number
- c. Proof of Life
 - Choose one **security question** from the list
 - Provide an **answer** you will remember (Both fields are mandatory)

- d. Add Dependents (Optional)
 - Click "Add another dependent" if applicable
 - Fill in the details for each dependent
- e. Next of Kin / Emergency Contact
 - Full Name (Mandatory)
 - **Relationship** (e.g., parent, spouse, friend)
 - Contact Number (valid phone number)
- → Click **NEXT**

Step 5: Upload Supporting Documents

📌 Responsible: User Associate Consultant

Upload the following documents:

Required:

- Academic Certificates (PDF/JPEG)
- CV or Experience Letter

Optional:

- Professional Certificates
- Any other relevant documents
- → Click **NEXT**

Step 6: Consent Forms & References

Responsible: User Associate Consultant

- a. Background Checks & Data Privacy
 - Two mandatory forms must be signed:
 - Background Verification Consent
 - Data Privacy Notice
 - Click the + symbol to open each form
 - Read the content and scroll to the bottom to click "Sign this"

b. References

- Enter details for two referees:
 - Email Address (Required)
 - Organisation Contact (Required)
 - Position & Organisation (Optional)
- Each referee must have a unique email
- → Click **NEXT**

Step 7: Review & Submit

Responsible: User Associate Consultant

- 1. Carefully review all sections of your onboarding profile
- 2. Click "Edit" to make corrections
- 3. Click "Submit" when everything is correct
- Reference emails are sent A verification request is sent to service.desk@adamsmithinternational.com

Step 8: Review and RDC Checks

Responsible: Service Desk (Eliza)

- 1. Go to People Management > People Directory
- 2. Filter profiles awaiting verification
- 3. Open the user profile and click "RDC Checks"

4. The RDC tool opens: RDC Login

If red flags appear:

- Conduct Navex Checks
- If red flags appear in the Navex Check too complete a **Due Diligence** Clearance Form
- Send it to **Legal** for review

Once cleared, mark the user as **Approved** in the system and upload the RDC report

Step 9: Final Verification Checklist

Responsible: Project Team

- Tick all verification checkboxes in the user's profile
- Once complete, the "Issue Contract" button will appear

Step 10: Issue Contract

Responsible: Project Team

- 1. In **People Directory**, search and open the user's profile
- 2. Click "Issue Contract"
- 3. Fill out the form:
 - Contract Template: Adviser Working Through Their Own Company Template (mandatory)
 - Contract Type: Fixed Term (select from dropdown)
 - Start Date
 - End Date
 - Line Manager (select from dropdown)
 - Principal Work Location
 - Project (select from dropdown)
 - Daily rate (if payment is fixed, monthly on deliverables please specify in Special Conditions Box or ToR - this will be manage through an Output Log)
 - Upload/Edit Term Sheet/Coversheet if needed this contains the adviser's company's details
 - Upload a ToR (either type/paste in text or upload JPEGs)
 - Edit Schedule 1 section
 - Specify any Special Conditions
- 4. Optional: Send for Review
 - Toggle: Send Contract for Review
 - Add reviewers
 - Save Draft > appears under My Approvals > Contract Review
- 5. Assign Signatory or Self-sign
 - Project Team assigns signatory (usually Project Director) or signs directly
 - Line Manager signs after the ASI Signatory if applicable
- 6. Contract sent to ASI Signatory first, then **User Associate**

Consultant

Step 11: Sign Contract & Finalise Onboarding

Responsible: User Associate Consultant

- 1. Open the email titled "Sign Contract and Complete your Onboarding"
- 2. Click the magic link
- 3. Sign these **forms**:
 - Ethics & Compliance Declaration
 - Conflict of Interest Declaration
 - Expression of Wish (it's optional for Associate Consultants)
- 4. Provide Bank Details
- 5. Review the contract, scroll through the cover sheet and full content
- 6. Click "Sign this"
 - You can update your signature if needed
- 7. Click "I agree & submit"
- 📌 Final screen displays Microsoft login credentials save these!

Step 12: Final Login

- Responsible: User Associate Consultant
- 1. Select "Complete Onboarding using Microsoft 365 credentials"
- 2. Set up the Microsoft Authenticator app for secure login
- 3. Login is now enabled via:
 - ASI email (primary login)
 - Personal email (backup contact)
- You now have full access to the OS.
- Notifications are sent to Service Desk, and the Line Manager

Onboarding Complete!

Subcontractor Consultants (end-to-end)

- Staff Type Definitions
- Subcontractor Consultant

A consultant engaged through a third-party organisation (such as a partner firm or supplier), not contracted directly by ASI. Subcontractor Consultants carry out specific project tasks under the terms of an agreement between ASI and their employer. They are granted OS access to log time, submit expenses, and collaborate with the project team during their assignment period. The subcontracting **contract is signed offline** by the **Legal team**, who also conduct the required due diligence checks. Once the contract is fully signed, a **third-party screening form** is submitted to

invoices@adamsmithinternational.com to initiate vendor onboarding. The third-party company is then **integrated into Sage**, after which it becomes visible in the OS for assignment and payment purposes.

- Role Type Definitions
 - Associate Subcontractor

General subcontractor users. They can **log their own time** but **cannot raise Purchase Orders.**

• Lead Subcontractor

Acts as the approver for Associate Subcontractors' time. They can approve

time but cannot log their own time. They can raise POs.

Associate Lead Subcontractor

A hybrid role. They can approve Associate Subcontractors' time, log their own time, and raise POs.

1 Note: Only the **Project Team** (PD, PM and AM) can carry out this process.

Step 1: Issuing the Invitation

- Responsible: Project Team
 - 1. Navigate to the OS and go to the left-hand menu.
- 2. Click **People Management > People Directory**
- 3. Click the "Onboard a New User" button.
- 4. Complete the **Invitation Form** with the following fields:
 - Name: Enter the full name of the user.
 - Personal/company email address: This will be used to send the onboarding link.
 - Staff Type: Select Subcontractor.
 - ASI Role: select Associate Subcontractor/Lead Subcontractor/ Associate Lead Subcontractor.
 - Location: This will influence payment and should be selected accurately.
- 5. Click **SUBMIT**.
 - An onboarding link is emailed to the user. This link is valid for 24 hours.
 - If the link expires, OS Support Team, IT team, Layth, Adrian can resend it by accessing the user's profile and clicking "Resend Invitation".

Step 2: User Receives Invitation Email

- Responsible: Subcontractor Consultant
 - 1. Open your personal/company email inbox.
- 2. Find the email titled "Welcome to Adam Smith International: Onboarding Email".
- 3. Click the magic link in the email.
- 4. You will be redirected to the ASI OS Onboarding Page.

Step 3: Entering Personal Information

- Responsible: Subcontractor Consultant
- a. Personal Info
 - First/Last/Display Name
 - DOB, Marital Status, Gender
 - Nationality, Language
 - ID Type & Number (Required)
 - Travel/Health Insurance: Yes = upload required
- b. Contact Info
 - Current & Permanent Address
 - City, State, Zip, Country
 - Phone Numbers

- Email (pre-filled)
- Check box if addresses match
- c. Upload Documents
 - ID (Front & Back) OR Passport (Mandatory)
 - Profile Picture (Optional)
- d. Create Signature
 - Draw or upload
 - Update anytime
 - Click NEXT

Step 4: Emergency and Health Information

- Responsible: Subcontractor Consultant
- a. Emergency Contact
 - Add **Blood Group** (Mandatory)
- b. Medical Declaration
 - Indicate whether you have any underlying health issues (Mandatory)
 - o If **Yes**, a field will appear to describe the condition
 - Provide Primary Doctor's Name and Contact Number
- c. Proof of Life
 - Choose one security question from the list
 - Provide an **answer** you will remember (Both fields are mandatory)
- d. Add Dependents (Optional)
 - Click "Add another dependent" if applicable
 - Fill in the details for each dependent
- e. Next of Kin / Emergency Contact (Optional)
 - Full Name (Mandatory)
 - **Relationship** (e.g., parent, spouse, friend)
 - Contact Number (valid phone number)
- → Click **NEXT**

Step 5: Upload Supporting Documents

Responsible: Subcontractor Consultant

Upload the following documents:

Required:

- Academic Certificates (PDF/JPEG)
- CV or Experience Letter

Optional:

- Professional Certificates
- Any other relevant documents
- → Click **NEXT**

Step 6: Consent Forms & References

- Responsible: Subcontractor Consultant
- a. Background Checks & Data Privacy
 - Two forms to be signed:
 - Background Verification Consent (not mandatory you can skip)
 - Data Privacy Notice mandatory
 - Click the + symbol to open each form

Read the content and scroll to the bottom to click "Sign this"

→ Click **NEXT**

Step 7: Review & Submit

- Responsible: Subcontractor Consultant
 - 1. Carefully review all sections of your onboarding profile
- 2. Click "Edit" to make corrections
- 3. Click "Submit" when everything is correct
- A verification request is sent to

service.desk@adamsmithinternational.com

Step 8: Review and RDC Checks

- **Responsible:** Service Desk (Eliza)
 - 1. Go to **People Management > People Directory**
 - 2. Filter profiles awaiting verification
- 3. Open the user profile and click "RDC Checks"
- 4. The RDC tool opens: RDC Login
- Mark the user as **Approved** in the system as the checks have already been conducted by **Legal**.

Step 9: Final Verification Checklist

- **Responsible: Project Team**
 - Tick all verification checkboxes in the user's profile
 - Once complete, the "Issue Contract" button will appear

Step 10: Issue Contract

- 📌 Responsible: Project Team
- 1. In **People Directory**, search and open the user's profile
- 2. Click "Issue Contract"
- 3. Fill out the form:
 - Contract Template: select "UK Subcontractor Associate
 Acknowledgement" from the drop down
 - Contract Type: Fixed Term (select from dropdown)
 - Start Date
 - End Date
 - Line Manager (select from dropdown)
 - Principal Work Location
 - Project (select from dropdown)
 - Daily rate (if payment is fixed, monthly on deliverables please specify in Special Conditions Box or ToR - this will be manage through an Output Log)
- 4. Optional: Send for Review
 - Toggle: Send Contract for Review
 - Add reviewers
 - Save Draft > appears under My Approvals > Contract Review
- 5. Assign Signatory or Self-sign
 - Project Team assigns signatory (usually Project Director) or signs directly
 - Line Manager signs after the ASI Signatory if applicable

6. Contract sent to ASI Signatory first, then **Subcontractor Consultant**

Step 11: Signing the Acknowledgement

- Responsible: Subcontractor Consultant
 - 1. Open the email titled "Sign Contract and Complete your Onboarding"
- 2. Click the magic link
- 3. Sign these forms:
 - Ethics & Compliance Declaration mandatory
 - Conflict of Interest Declaration mandatory
 - Expression of Wish (it's optional for Associate Consultants)
- 4. Review the contract acknowledgement, scroll through the cover sheet and full content
- 5. Click "Sign this"
 - You can update your signature if needed
- 6. Click "I agree & submit"
- **Final screen displays Microsoft login credentials** save these!

Step 12: Finalising Onboarding

- Responsible: Subcontractor Consultant
- 1. Select "Complete Onboarding using Microsoft 365 credentials"
- 2. Set up the **Microsoft Authenticator app** for secure login
- 3. Login is now enabled via:
 - ASI email (primary login)
 - Personal email (backup contact)
- You now have full access to the OS.
- Notifications are sent to **Service Desk**, and the Line Manager **Onboarding Complete!**

Company Portal

This guide provides step-by-step instructions for installing and configuring the Microsoft Company Portal on a personal Windows device. To securely access ASI systems, all users must complete this setup when prompted. Installing the Company Portal ensures the device complies with ASI's security standards and enables access to essential tools, applications, and project resources.

Definition

The Company Portal enables access to project tools, corporate apps, and email, while ensuring the device is compliant with cybersecurity policies. It's a mandatory requirement for all Core/Non-Core Users, Associate Consultants, and Subcontractor Consultants using personal devices.

Step-by-Step Installation Prerequisites

You must be using Windows 10 or 11 Professional.

- Ensure your device is password-protected and has antivirus + firewall.
- BitLocker should be enabled (Windows Pro only).
- Your operating system must be up to date.

1. Install the Company Portal

- Go to: Microsoft Store Company Portal
- Click Get to install the app.
- If the Store won't load, search for "Microsoft Store" on your device and update it.

2. Launch & Begin Setup

- Open the Company Portal app.
- Click the blue link that says:
 "This device hasn't been set up for corporate use yet..."
- Click Next.

3. Join Microsoft Entra ID

- Enter your ASI email address.
- Click Join when you see:
 Connecting to: <u>adamsmithinternational.com</u>
 and your correct details.

4. Allow Device Management

- When prompted, tick "Allow my organisation to manage my device".
- Sign in again if asked.
- Click OK and Done.

5. Complete Final Steps

- Select your device type as Microsoft Windows (desktops and laptops).
- Click Done.
- Click Check Access it may take a couple of hours for policies to apply.

You're All Set When:

- Company Portal says: "Can access company resources".
- If not compliant, the app will guide you to fix the issues.

Need Help?

Email: Service.Desk@adamsmithinternational.com
Use subject line: "Company Portal Setup Help"

Change Log

This user guide explains everything you need to know to confidently use the Change Log module in ASI OS. Whether you're a Line Manager, Program Director, or part of the P&T team, this guide walks you through every click, step, and decision in simple, no-guessing terms.

What Is the Change Log Module?

Definition Think of the Change Log Module as your control panel for making formal changes to someone's job details — things like department, rate, title, or line manager. It ensures there's a proper record, audit trail, and approvals.

You use it when:

- A user (User Associate Consultant, Subcontractor Consultant, Core/Non-Core User) is moving departments
- Their job title or rate changes
- A secondment letter is needed
- You need them to digitally sign off the change made

What Can You Change (and Who Can Do It)?

Responsible:

P&T

Project Team (Project Manager, Line Manager, Assistant Manager) Support

Associate Consultant, Subcontractor Consultant, ****Core/Non-Core

Changes approvers:

P&T → Core/Non-Core User,

Project Director → Associate Consultant, Subcontractor Consultant

- ✓ You CAN change:
 - Department (e.g., from "Corporate" to "Business Development")
 - Job Title (e.g., from "Analyst" to "Senior Analyst")
 - Daily/Monthly Rate
 - Line Manager
 - Program Director
- You CANNOT change these in an amendment. These require a brand new contract to be issued. If you're unsure **ask OS Support**.
 - (Entity)ASI Location
 - Contract Start Date
 - Contract Template
 - Employee ID

No approval is needed when **users** (Associate Consultant, Subcontractor Consultant, ****Core/Non-Core) change **their own**:

- General Info (e.g., name spelling)
- Emergency Contacts
- Bank Details
- Disclaimer Forms

Who Gets Notified and When?

ACTION	WHO GETS NOTIFIED?
--------	--------------------

User/P&T/Project Team/Support submits a change request	The appropriate approver
Direct change, no signature	For Core & Non-core:
User, Line manager, P&T	

For ACs, Subcontractors: User, Line manager, Project Director | | Change that needs signing | The user gets an email to sign | | Change is approved | For Core & Non-core: User, Line manager, P&T

For ACs, Subcontractors: User, Line manager, Project Director | | Change is rejected | The person who requested the change |

- Need to change the approver? Use the 'Change Approver' button to reroute it.
- Want the change to take effect later? Use 'Change Applicable From' to schedule it.

What Is the Default Contract and Why It Matters

- It's what the system looks at to know your job title, department, rate, etc.
- The details on your default contract reflect on your HR Card.
- Every time an amendment is approved, it updates the **Default** Contract.

Only Admins can directly change a default contract (without the amendment process).

Coming soon:

- P&T will be able to update defaults for Core/Non-Core.
- IT Support will do this for Associate Consultant and Subcontractor Consultant.

How to Submit a Change (Amendment)

- 1. Go to the user's profile → click on the **Contract tab** → choose **Default**Contract
- 2. Click **Actions** → select **Issue Amendment**
- 3. Make the changes (e.g., Department to "Finance")
- 4. Use the **Change Applicable From** field to schedule the start date (or leave it as "today")
- 5. Add a short note in the message box this gets emailed to the person
- 6. Toggle ON the signature option if you want the user to sign the change
- 7. Click Issue Contract Amendment, then confirm it

You'll see a success message — it's now in the approval queue

What Happens When Signature is Needed?

- 1. The user receives an email asking them to sign
- 2. They log into asi.online and go to **My Amendments**
- 3. They click **View > Sign**
- 4. Once they sign, it goes to the Project Director or P&T for approval
- 5. When approved, the changes update live on their HR Card and Default Contract

A copy of the signed change is saved in the system.

How to See What's Been Changed

To track exactly what was changed for a user — and when — follow these steps:

Step 1: Go to People management > People Directory > Search for User's Profile

Click on the name of the person whose changes you want to see.

Step 2: Click on the "Change Log" Tab

This tab shows every amendment ever submitted for that person:

- Status (Pending / Approved / Rejected)
- Who made the change
- When it was submitted

Step 3: Use the Contract Tab for More Detail

Go to the **Contract tab > Default Contract > History**. This shows:

- A timeline of all changes
- What the previous and new values were
- Who made each change

Step 4: If You Are the Approver

Click on **My Approvals > Change Log**. This shows:

- Any changes waiting for you to approve
- A record of what you've already approved

Step 5: If You Are the User Being Asked to Sign

Click on My Amendments. You'll see:

- All changes awaiting your signature
- History of past signed amendments

! Still Not Seeing a Change? Check if the change is stuck on "Pending" status. A change won't reflect on the HR card until it's:

- 1. Signed (if required), and
- 2. Approved by the Project Director or P&T.
- Go to Change Log tab
- Click Advanced Filters
- Choose a field (e.g. Daily Rate)
- Now you can see every change made to that field over time

You can filters by:

- Rate
- Department
- Job Title
- Line Manager

How to See Old, Current, and Past Contracts

Go to the User's profile → Contract tab → Click one of three types of contract versions:

1. Original Contract

- Go to the user's profile → Contract tab
- Click View Original Contract
- This shows the first contract the user ever signed when they joined ASI OS

2. Latest Contract

- Click View Latest Contract
- This shows their current, most up-to-date contract
- Reflects all approved changes (job title, rate, department, etc.)

3. Custom Contract (Past Version)

- Click View Custom Contract
- Enter a date (e.g., 23 May 2025)
- You'll see the contract version that was active at that specific time This functionality is great for checking what someone's rate or title was on a **past date** (e.g., for auditing or payroll).

Secondments & Multiple Contracts Explained

A **secondment** is used when someone temporarily moves to a new job, country, or team.

- 1. Go to the Core/Non-Core User's Profile → Contract tab
- 2. Click Issue Secondment
- 3. Choose the relevant **template**, job title, location, and rate
- 4. Edit details as needed
- 5. Click Issue → the user will receive a notification to sign it
- 6. Once signed, it becomes **visible** in the Contracts section as a separate contract
- I The Secondment does **not overwrite** the main contract it sits alongside it. Users can have:
 - A main contract (Default)
 - One or more **secondment contracts**

All contracts are:

- Visible separately under the **Contracts tab**
- Tracked individually with dates and versions

Only one contract at a time will act as the **Default**, which determines the user's OS identity and access.

How to Share a Contract for Review

Use this if you need someone else to **read** the contract without needing them to **sign** or **approve** it.

- 1. Go to the User's Contract tab
- 2. Select the appropriate contract (Default or Secondment)
- 3. Click Send for Review
- 4. Enter the name of the person you want to share it with (e.g., Brie)
- 5. The reviewer will find it on their OS Profile under My Approvals → Contract Review

I This is view-only access and is ideal for giving someone temporary visibility (e.g., Legal, Project Director, Line Manager, etc).

Quick Summary (Cheat Sheet)

This cheat sheet gives you a super simple overview of how to submit and process a contract change in ASI OS.

Amendment Process – At a Glance

1. Go to the User's Profile

- Navigate to their Contract tab
- Open their **Default Contract**

2. Click "Actions" → Select "Issue Amendment"

This starts the contract change process

3. Edit the Fields That Need Changing

- E.g., Department, Job Title, Rate, etc.
- Cannot edit: ASI Location, Start Date, Template

4. Set "Change Applicable From" Date

Optional: pick a past/future date for the change to take effect

5. Write a Message to the User

- o This is included in their notification email
- E.g., "Your department was incorrect we've updated it to 'Finance'"

6. Toggle ON Signature Required (Optional)

- Turn this ON if you want the user to sign the change
- Leave OFF if no signature is needed

7. Click "Issue Contract Amendment" → Confirm

- You'll get a success message
- The request is now in the **Approvals Queue**

8. User Signs (If Required)

- The user will see it under My Amendments
- They click **Sign** to confirm

9. Approver Reviews and Signs

- Core/Non-Core: P&T signs
- Associate Consultants / Subcontractor: Program Director signs

10. Amendment Goes Live

- The change is reflected in:
 - HR Card
 - Default Contract
 - Change Log

Troubleshooting Shortcuts

- Use Change Applicable From to time changes properly
- Use **Change Approver** to reroute if someone is unavailable
- Advanced filters help you track changes precisely
- Commenting creates a clear audit trail
- You can withdraw amendments before approval if needed

Need help? Reach out to **OS Support** any time.

New Login Page and Error Handling

This guide explains how to navigate the new login page, troubleshoot common errors, and understand error codes. It also provides instructions on fallback options and when to contact support.

Authentication Flow Overview

When a user accesses the login page and enters their email, the backend determines whether to:

- Redirect the user to Microsoft 365 SSO login.
- Send a temporary login link and code by email.

System Decision Process

After email submission, the backend evaluates and responds with one of the following:

- Redirect to Microsoft 365 Login Page if SSO is appropriate.
- Send Temporary Login Link and Code:
 - Click the emailed link to be logged in.
 - Alternatively, click "Enter code manually" on the login page.
 - Enter the code from your email.
 - Click **Login** to proceed.

You may see the manual code entry option if:

- You are in onboarding.
- Your Entra ID and OS are not correctly linked.
- The email is not associated with an OS account.

Full Error and Status Code Reference

Code	Status	Description	Remediations
1000	error	User is not entering the email address in the field on the login page.	Inform the user to enter a valid email address when logging into the OS.
1001	error	Failed to fetch user information.	Code Issue. Inform Dev team with the email of user getting this error.
1002	error	The email address that the user entered is not associated with an account in the OS.	User is not shown this error. Instead the email sent to the email address provided by the user screen is shown.

1003	error	The email address that the user entered was found associated with multiple accounts in the OS.	Search the OS database using their email address and name. Delete the account that has no information. Check for empty fields:
Display Name, First Name, Last Name, Staff Type			
1100	error	The email address that the user entered is associated with a disabled account in the OS	If the user is not supposed to be marked as disabled then change the "Account Status" field in the user table of the OS database as "Activate".
3000	warning	The user is entering an email address that is not their primary one but their secondary one.	Inform the user to use their ASI issued email address to login when they are not in onboarding and if they are then use their personal email address.

3101	error	The email address that the user entered is associated with an account that is not connected to their active directory account.	No fix required here. The user will be sent an email with link to login and when they do a fix will be applied automatically. The second time they login they will be redirected to the Microsoft with the correct account.
3102	error	The email address that the user entered is associated to an account that: 1. If in onboarding has their ASI issue email set as primary email 2. If not in onboarding has their personal email set as primary email	In both cases we need to switch the emails present in the fields "email" and "Secondary Email" in the OS Database with each other
3103	error	The email address that the user entered is associated to an account that when searched for in Active Directory using their display name returned an active account.	Search the Active directory for the user using their name and replace the email field in user table in OS database with the email found in Active directory.

3201	error	The email address that the user entered is associated to an account that has another active directory account connected when it should be the one in the email field in user table in OS database.	No fix required here. The user will be sent an email with link to login and when they do a fix will be applied automatically. The second time they login they will be redirected to the Microsoft with the correct account.
3202	error	The email address that the user entered is associated to an account that has an active Active Directory account but it was found using their secondary email address.	We need to switch the emails present in the fields "email" and "Secondary Email" in the OS Database with each other.

Once that is done the user needs to login again and the user will be sent an email with link to login and when they do a fix will be applied automatically. The second time they login they will be redirected to the Microsoft with the correct account.			
3203	error	The email address that the user entered is associated to an account that has an active Active Directory account but it was found using their Name.	Search the Active directory for the user using their name and replace the email field in user table in OS database with the email found in Active directory.

Once that is done the user needs to login again and the user will be sent an email with link to login and when they do a fix will be applied automatically. The second time they login they will be redirected to the Microsoft with the correct account.			
4100	error	Failed to send login email.	Code Issue. Inform Dev team.
4200	error	Data not receiving from Active Directory.	Code Issue. Inform Dev team with the email of user getting this error.

Fallback to Old Login Page

- The previous login page will be available as a **backup for one week**.
- If needed, use the fallback link provided by the **OS support team**.

Automatic Error Logging

- All login attempts and errors are **automatically logged** in Bubble.
- These logs help us identify and resolve recurring issues.

Need Help?

If you encounter issues not covered in this guide, please reach out to the **OS Support Team** for assistance.

Leave Management

This guide covers the **Leave Management Module**, which enables users to request, track, and manage different types of leave, including annual, sick, and unpaid leave. It also provides tools to view leave balances, holiday calendars, designate approvers, and streamline approval workflows for both staff and line managers.

How do I submit a leave request?

This guide explains how to submit a leave request in the ASI OS. It walks you through each step of the process, including leave type selection, balance visibility, and optional fields like delegation. This guide is suitable for Core/ Non-Core Users and Line Managers reviewing leave submissions.

Step-by-Step Instructions

1. Click on Leave Management

Go to the Work Management section in the side menu and click Leave **Management** to open the dashboard.

2. Click on Leave Request Button

At the top right of the Leave Management dashboard, click the Leave Request button to start a new request.

3. Select Leave Type

Click on the **Leave Type** dropdown and choose the appropriate type of leave:

- Annual Leave
- Sick Leave
- Unpaid Leave, etc.

4. View Leave Type Balance (Before)

Once you select the leave type, your current balance will display:

- Allocated Days total leave days granted
- Days Taken leave already used
- Remaining Balance = Allocated Days Days Taken

5. Toggle to Apply for Single or Half-Day Leave

If you want to apply for:

- A single day or half day, toggle on the "Apply for single/half day leave" switch.
- Select the **Date** and **Part of the Day** (Morning, Afternoon, Full Day)
- Leave **cannot** be applied:
- On the same day
- On official holidays

6. Apply for Multiple-Date Leave

If you are applying for leave covering multiple days:

- Ensure the single/half day toggle is off
- Use the calendar to select a Start Date and End Date
- Click **OK** after choosing dates
- Avoid selecting weekends or official holidays unless allowed.

7. View Leave Type Balance (After)

Once dates are selected, your updated balance will appear:

- Allocated Days
- Days Taken
- Remaining Balance = Previous Balance Days Requested

Example:

- Allocated Days: 15
- Previous Balance: 7.5

- Days Requested: 5
- Remaining Balance: 2.5

8. Leave Request Metrics

The system shows a summary of your request:

- Duration of Leave
- Public Holidays in Range
- Updated Balance After Request

9. Select a Designate Person (Optional)

If needed, assign a **Designate Person** to take over your approvals:

- Use the search bar to find and select a colleague
- They will receive and act on approvals during your leave

10. Add Description & Attachments (Optional)

You can:

- Add a **note** explaining your leave
- Attach **documents** (e.g., medical note for sick leave)

11. Click Submit

Review all details and click **Submit** to send your leave request for approval.

12. Confirmation of Submission

A success message will appear to confirm your request has been submitted.

13. Check Leave Status on Dashboard

After submission:

- Your request appears in the Leave Dashboard as Submitted for Approval
- You will be notified by email once your line manager has taken action

14. Delete the Request (If Needed)

To delete a pending request:

- Go to the Leave Dashboard
- Locate the request (must not be approved or started)
- Click the **bin icon** to delete it

How can I review and manage my own leave requests?

This guide explains how to view, monitor, and interact with your leave requests in the OS. Follow the steps below to access leave request details, post comments, and track approval status.

Step-by-Step Instructions

1. Navigate to People Management > Leaves

- From the left-hand sidebar menu, scroll to the **Work Management** section.
- Click on **People Management** to expand its submenu.
- Then click on **Leaves** to open the leave management dashboard.

2. Click on the "Leave Reqs (LR)" Tab

- Once you're in the Leave Management dashboard, locate the tab labeled Leave Reqs (LR) near the top of the page.
- Click this tab to view all the leave requests you have submitted.

3. Review Your Leave Requests

- You will now see a list of your existing leave requests.
- Each entry typically shows key information such as:
 - Leave type
 - Duration (start and end dates)
 - Current status (e.g., Submitted, Pending Approval, Approved, Rejected)

Use available filters to search by:

- Date range
- Contract type
- Status
- Designate person (if any)

4. Select a Leave Request to View Details

- Click on the row or title of a specific leave request to open its detailed view.
- This will display all relevant data, including:
 - Selected leave type
 - Days requested
 - Public holidays (if any)
 - Leave balance before and after the request
 - Description or notes provided at submission
 - Any attached documentation

5. Post a Comment (Optional)

- At the bottom of the leave request detail page, there is a comment box
- You can use this to:
 - Ask a question
 - Clarify information
 - Respond to feedback from your manager
- All comments are visible in the thread for transparency.

6. View the Activity Log (Optional)

- On the right-hand side of the leave request detail page, you will find the Activity Log.
- This section records:
 - Each status change (e.g., submission, approval, rejection)
 - The person who took the action
 - The date and time of each update

Use this log to track the progress of your request and ensure all actions are properly recorded.

If you need to delete or amend a request, return to the main Leave Reqs (LR) tab and locate the relevant request. Actions like cancel, delete, or resubmit (if supported) will be available depending on the status of your request.

Where can I review my Leave Balance?

This guide walks you through the steps to view your leave balance in the OS.

You'll be able to track how many days you've been allocated, how many you've used, and how many remain—per leave type.

Step-by-Step Instructions

1. Go to People Management > Leaves

- In the left-hand sidebar, scroll to the Work Management section.
- Click on **People Management**, then select **Leaves** from the submenu.
- This opens the Leave Management dashboard.

2. Click on the "My Leave Chart" Tab

- At the top of the Leave Management screen, you'll see multiple tabs.
- Click on the one titled My Leave Chart.
- This tab displays your personal leave summary across all available leave types.

3. Review the Leave Chart Summary

- The Leave Chart section provides a high-level summary of your entitlement and usage.
- For each leave type, the summary includes:
 - Allocated Days how many days you were granted
 - Days Taken how many days you've already used
 - Remaining Balance how many days are left

4. Explore the Leave Chart Details

- Below the summary, you will see individual entries for each leave type (e.g., Annual Leave, Sick Leave, etc.).
- Each row gives a quick view of:
 - Type of leave
 - Allocation
 - Usage
 - Remaining days

5. Click the (+) Icon to Expand a Leave Type

- For each leave type listed, there is a small plus icon (+).
- Click on this icon to expand and view a detailed breakdown, which may include:
 - Historical usage
 - Carryovers
 - Expiry rules (if applicable)
 - o Notes added by the admin or HR

6. Understand the Leave Type Overview

- Each expanded section helps you understand:
 - How your leave is calculated
 - What portion of it has been carried over (if any)
 - o Whether any of the remaining balance is due to expire soon

Use this information to plan your time off responsibly and avoid losing unused days.

You can revisit this section at any time to stay updated on your available leave. Let O OS Support or your Line Manager know if you notice any

discrepancies.

How to view and approve designate leave requests

This guide outlines how to view and approve leave requests on behalf of others who have assigned you as their designate. You will learn where to find these requests and how to action them.

Step-by-Step Instructions

1. Navigate to People Management > Leaves

- Open the **left-hand sidebar** on the OS dashboard.
- Go to Work Management and click People Management.
- From the dropdown, select **Leaves** to open the Leave Management module.

2. Click on the "Designate LRs" Tab

- At the top of the Leave Management page, locate the tab labeled
 Designate LRs.
- Click this tab to access all leave requests that have been assigned to you for review and approval.

3. Review the Designate Leave Requests

- You'll now see a list of leave requests submitted by individuals who have selected you as their designate.
- Each request line will show key details:
 - Employee name
 - Leave type
 - Requested dates
 - Current request status (e.g., Submitted, Pending, Approved)
- Use filters to narrow down results by contract type, approver, or date range.

4. Click on a Request to View Full Details

- Select a request by clicking on it to open the full view.
- You will see:
 - Leave duration
 - Balance impact
 - Attachments
 - Any description or justification provided

5. Approve or Reject the Request

- Scroll to the bottom of the detailed view.
- Click either **Approve** or **Reject** based on the information provided.
- Optional: Add a comment to explain your decision before submitting the action.

6. Review the Activity Log and Comments (Optional)

- On the right-hand panel of the request, you can view:
 - The full activity trail
 - All comments posted by the original user or previous approvers
- This helps ensure transparency and accountability throughout the approval workflow.

Be sure to check this section regularly if you are designated by multiple users, as you will be responsible for managing their leave approvals during their absence.

How to review a user's leave data, leave request and leave chart?

This guide explains how to access detailed leave data for individual users in the OS. You can view their leave entitlements, balances, and breakdown by type.

Step-by-Step Instructions

1. Go to Leave Management

- Open the left-hand sidebar and navigate to **Work Management**.
- Click on **Leave Management** to access the full module.

2. Click on the "User List" Tab

- From the top of the Leave Management screen, click on the User List tab.
- This will display a list of users in your team, department, or area of access.

3. Select a User

- Find the user whose leave data you want to review.
- Click their name to open their leave record.

4. Click on "View LRs" (Leave Requests)

- Within the user's profile, locate and click the **View LRs** button.
- This opens a list of all submitted leave requests by the selected user.

5. View Leave Request Data

- You'll see:
 - Leave types requested
 - Duration and date range
 - Approval status
 - Comments or notes submitted

6. Click on the "Leave Chart" Tab

- Go to the top navigation bar within the user profile.
- Click on **Leave Chart** to access summary and detailed data.

7. Expand Leave Types with the Plus Icon

- You'll see a list of available leave types.
- Click on the **plus (+)** icon next to each type to expand it.

8. Read the Leave Type Data

Each expanded section includes:

- Standard Allocated Days how many days were granted for the year
- Additional Allocated Days extra days if any
- Total Allocated Days sum of standard and additional
- Days Taken days used so far
- Remaining Balance days still available
- Cycle e.g., yearly or monthly
- Allocation Method e.g., auto or manual

This view helps managers and admins oversee entitlements and usage per user, per leave category.

Use this information to support performance discussions, manage capacity, and maintain accurate reporting across your team.

How to view and Edit Leave Types (Admins)

This guide provides clear steps to view, explore, and edit leave types in the OS. This function is typically used by admins or people with special access permissions to manage leave entitlements and setup.

Step-by-Step Instructions

1. Go to Leave Management

- From the left-hand menu, open the **Work Management** section.
- Click on **Leave Management** to access the main dashboard.

2. Click on the "Leave Types" Tab

- At the top of the Leave Management interface, find and click the tab titled **Leave Types**.
- This tab displays a list of all leave categories used within the organisation.

3. Review the List of Leave Types

- You will see a table with all defined leave types (e.g., Annual, Sick, Study, Compassionate).
- Each row contains a brief overview including:
 - Name
 - Cycle (Yearly, Monthly)
 - Allocation Method
 - Approval structure

4. Expand a Leave Type for More Details

- To view more information for any leave type, click the **plus (+)** icon beside the row.
- This will reveal:
 - Standard allocation rules
 - Whether it's eligible for carryover
 - Additional configurations

5. Open Leave Type Details for Editing

- Once expanded, locate the Edit button (if visible to you).
- Click **Edit** to open the leave type form.

6. Make Your Edits

- Inside the edit view, you can:
 - Change the leave name or display label
 - Update allocation amounts or rules
 - Modify approval logic
 - Set visibility restrictions or rules
- Be cautious—edits may affect users system-wide.

7. Save Changes

- After completing your edits, scroll down and click **Save** or **Update**.
- Your changes will immediately apply and reflect in users' leave charts and requests.

Use this tool to keep leave types aligned with HR policies and to accommodate new leave schemes or policy changes.

How to view and Edit Holidays (Admins)

This guide explains how to manage and customise holidays in the OS. You can view, update, or edit the list of holidays that apply to your organisation.

Step-by-Step Instructions

1. Go to Leave Management

- From the main sidebar, go to the **Work Management** section.
- Click on Leave Management to open the dashboard.

2. Click on the "Holidays" Tab

- At the top of the Leave Management interface, find and click on the tab titled Holidays.
- This will show the list of holidays already created in the system.

3. View the Holiday List

- The table will include information such as:
 - Holiday name (e.g., New Year's Day)
 - o Date
 - Type (Public, Company-specific, etc.)
 - Duration (e.g., single-day or multi-day)

You can scroll through or use filters to locate specific entries.

4. Click the Edit (Pen) Icon to Modify a Holiday

 To edit a holiday, click the **pen icon** located in the actions column next to the holiday entry.

This will open a form where you can:

- Change the name or type of holiday
- Adjust the start and end dates
- Add internal notes (if supported)

5. Click on "Update Holiday" to Save Changes

- Once your edits are complete, click Update Holiday or Save to apply the changes.
- The holiday list will refresh with your updates immediately visible.

Only users with permission to manage holidays will see the edit option. Make sure you coordinate with HR or your line manager before making changes to official dates.

Leave Reversal (Admins)

This guide explains how to reverse an approved leave request in the ASI OS. It includes detailed steps and role-based access guidance.

Only P&T can reverse leave requests.

What is a Leave Reversal?

A **Leave Reversal** is used to cancel an already approved leave entry when:

- The wrong dates were submitted.
- The leave was requested by mistake.
- The employee's plans changed and they no longer need leave.
- Only P&T can reverse leave requests.

Line Managers and general Core/Non-Core Users **cannot** reverse leave in the system.

Role Permissions Explained

Role	Can Reverse Leave?
P&T	Yes
Line Manager	No
Core/Non-Core User	No
Support	No
Service Desk	No

Step-by-Step: How to Reverse a Leave Request

1. Log in to ASI OS

- Visit https://asi.online
- Click Login
- Enter your email address
- Log in via Microsoft 365 or secure email link (based on your profile) Note: If you have trouble logging in, contact OS Support for help.

2. Locate the User Profile

- * Responsible: P&T Only
 - Use the **Search bar** to enter the staff member's name
 - Click on their profile to open the HR Card
- I Tip: You can also access the user via the Team Directory or Org Chart.

3. Go to the Leave Section

- In the HR Card, click the Leave tab
- View the list of all leave entries (past, current, and upcoming)
- Use filters or scroll to find the relevant approved leave request

4. Confirm the Leave to Be Reversed

- Make sure the leave status shows as **Approved**
- Double-check the:
 - **Leave Type** (Annual, Sick, Maternity, etc.)
 - Date Range
 - That the leave hasn't already been cancelled or reversed

5. Reverse the Leave

Responsible: P&T Only

- 1. Click the **Reverse** button next to the leave entry
- 2. A modal window will appear requesting a **reason**
- 3. Input a clear reason (e.g. "Submitted incorrect dates" or "Leave not needed anymore")
- 4. Click **Submit** to confirm the reversal

What happens:

- The leave request is removed
- The user's leave balance is updated automatically
- The reversal is logged in the system for auditing

What is Logged When a Leave is Reversed?

Once a reversal is submitted, the system tracks:

- Who performed the reversal
- Timestamp of the reversal
- Reason entered

This is visible in the Power BI Leave & Performance Dashboard

Dashboard Access: Tracking Leave and Reversals

P&T and **Line Managers** can use the dashboard to:

- View leave history
- Track reversal logs

Quick Summary: Who Can Do What?

Action	Who Can Perform It
Submit Leave Request	Core/Non-Core User
Approve Leave	Line Manager
Reverse Approved Leave	P&T
View Leave Dashboards	P&T, Line Manager

Petty Cash

This guide explains **how to create, manage, and use** a Petty Cash account in the OS. It's structured for clarity, with role-based tagging and comprehensive instructions to support Petty Cash Managers, Accountants, Suppliers, and OS Support.

What is the Petty Cash Module?



The **Petty Cash** module in the OS is a financial tool used to manage small, project-related cash transactions. It allows Petty Cash Managers to request top-ups, issue advances to employees, record returns, and track expenses. Accountants oversee and approve fund requests, while Suppliers are linked to the funding source. The module ensures accountability and transparency in cash handling.

How to Access the Petty Cash Module

- 1. Open the **Navigation Bar** from your OS dashboard.
- 2. Scroll down to the **Work Management** section.
- 3. Click on **Petty Cash**.
- 4. You will be redirected to the **Petty Cash landing page** where you can:
 - View all existing Petty Cash accounts.
 - Add a new Petty Cash account.
 - Manage advances, returns, expenses, and more.

How to Create a New Petty Cash Account

Only users assigned the **Petty Cash Manager** role can create and manage

accounts.

Steps:

- 1. Click the + Add New Account button (top-right corner of the screen).
- 2. Fill in each of the following fields:

	3 Field	4 Description
5	Account Name	6 A clear, descriptive name for the petty cash account. Example: "Kenya Education Project – Nairobi Office"
7	Petty Cash Manager	8 The user responsible for managing this account (e.g., requesting top-ups, issuing advances, recording returns).
9	Supplier	10 The name of the vendor or partner company associated with the account.
11	Accountant	12 The OS user responsible for reviewing and approving top-up requests.
13	Location	14 Where the account is used – e.g., country, region, or city.
15	Currency	16 The operating currency for the account (e.g., GBP, USD, KES).
17	Contract(s)	18 Select the relevant project contract(s). You can select multiple if needed.
19	Bank Details	20 Enter the recipient bank account where top-up funds will be transferred once approved.

²¹ Click **Save**. You'll now see the account listed on the Petty Cash main page.

Viewing and Managing an Account

Click on any existing account to open the Account Overview page.

At the Top:

You'll see KPIs that reflect the account's financial status:

- Current Balance Total funds currently available.
- Available Cash Remaining cash after accounting for advances/ expenses.
- **Total Top-Up** Total amount ever topped-up into this account.

Tabs Within the Account:

• Ledger:

A full log of every transaction – includes:

- Top-Ups
- Advances issued
- Returns received.
- Expenses logged

• Expenses:

A filtered view showing only logged expenses.

• Employee:

Transactions are grouped by individual employees. For each:

- See total advance, total return, and net balance.
- Review a full breakdown of all transactions related to the employee.

Key Actions You Can Perform

1. Request a Top-Up (by Petty Cash Manager)

This is the first action to perform after creating a new account.

Steps:

- 1. Click **Request Top-Up** inside the account.
- 2. Enter:
 - ∘ Top-Up Amount e.g., 1000 GBP.
 - Reason/Description e.g., "Initial funds for Q2 activities."
- 3. Submit the request.

Approval Process:

- The **Project Accountant** will:
 - Open the request under the Petty Cash > Approvals tab.
 - Review all details.
 - Enter the **Journal ID** (e.g., check or receipt number).
 - Upload Proof of Payment (PDF, image, etc.).
 - Click Confirm to approve.

Once confirmed, the balance will immediately reflect the approved top-up.

2. Issue an Advance to an Employee (by Petty Cash Manager)

Use this feature to give an employee a portion of the available petty cash for fieldwork, logistics, or purchases.

Steps:

- 1. Inside the account, click **Issue Advance**.
- 2. Fill in:
 - **Employee Name** must be an active user in the OS.
 - Date & Time
 - **Description** e.g., "Advance for workshop venue booking."
 - o Amount e.g., 500 GBP.
- 3. Click **Submit**.
- 4. The system:
- Updates the available balance.
- Logs the advance under the **Employee** section.

3. Record a Return from an Employee (by Petty Cash Manager)

Use this to log any unspent amount returned by the employee.

Steps:

- 1. Click **Record Return** inside the account.
- 2. Enter:
 - **Employee Name** must match the one who received the advance.
 - Returned Amount
 - Date & Time
 - Description e.g., "Unspent amount from workshop budget."
- 3. Click Submit.

The system will reflect the return in the Employee section and update the account's available cash.

4. Transfer Funds Between Petty Cash Accounts

Use this if you need to reallocate funds across projects or locations.

Steps:

- 1. Click Transfer Funds.
- 2. Provide:
 - Receiving Petty Cash Account
 - Transfer Amount
 - **Exchange Rate** (if transferring between different currencies)
 - Description
- 3. Click **Submit** to complete the transfer.

Both accounts will reflect the transaction in their Ledger.

5. Log an Expense on Behalf of Petty Cash

Used by any user who has received a Petty Cash advance and needs to report how it was spent.

Steps:

- 1. Go to the **Expense Logging** section.
- 2. Under "Source of Funds," select Petty Cash.
- 3. Select the relevant:
 - Petty Cash Account
 - Contract
 - Proiect
 - Work-stream
 - Expense Description
- 4. Attach a receipt or supporting document if required.
- 5. Submit the expense.

The amount will be deducted from the employee's advance balance and reflected in the Ledger.

Edit or Delete a Petty Cash Account

- Edit: Click the pencil/edit icon to update any account details.
- **Delete**: Only use this if the account has no recorded transactions. Deletion is **permanent**.

Support and Troubleshooting

If you:

- Cannot access the Petty Cash module
- Receive an error while submitting a transaction

• Are unsure which contract or supplier to use Please contact the **OS Support** team directly.

Project Management

The **Project Management** module is where all contracts, projects, work streams, resources, and related expenses are created, managed, and tracked in the OS. This chapter provides step-by-step guidance on how to:

- View and manage contracts
- Add and edit projects and work streams
- Assign and manage resources
- Set up time and expense billing structures
- Troubleshoot common issues

Whether you're overseeing internal operations or external client delivery, this module helps ensure **accurate resourcing**, **visibility**, **and reporting** throughout the project lifecycle.

How to View Any Contract Details

This section explains how to easily find and view the key details of any contract (project) in the OS, including the contract's summary, budget, and progress status.

Steps to View a Contract Overview

- 1. **Open the sidebar** on the left-hand side of your screen.
- 2. Click on Work Management, then select Projects.
 - → This will take you to a full list of all active and past contracts/ projects.
- 3. By default, you'll see **external (client-facing) projects** only.
 - If you want to view a corporate/internal project, toggle the Corporate switch ON at the top of the project list.
 - → The list will update to show internal projects.
- 4. Use the **search bar** at the top or the **filter options** to find a specific project.
 - → You can search by project name or filter by department, status, or staff member.
- 5. Click on the name of the project you want to view.
- 6. Once inside, you'll land on the **Overview** tab.

Here you can view:

- A short project summary
- Key timelines and milestones
- Budget and spend analytics
- Main contacts and stakeholders
- Deliverables and overall progress

No need to download anything - all details are visible directly in the OS.

Tip: How to Pin a Project for Quick Access

If you open a project frequently, you can pin it to your sidebar so you don't

have to search for it each time.

- Open the project you want to pin.
- Click the pin icon in the top-right corner of the screen.
- The project will now appear in your **left-hand sidebar**.
- You can pin **multiple projects** and jump between them easily.

How to View Resources Linked with a Contract

This section explains how to view all the **people and resources assigned to a specific contract**, including their roles, transaction categories, and profiles. **Steps to View Project Resources**

- 1. **Open the sidebar** on the left-hand side of your screen.
- 2. Click on Work Management, then select Projects.
- 3. From the list of projects, **click on the contract** you want to view resources for.
- 4. Once inside the project, click on the **Project Resources** tab at the top.
- 5. You will now see a **full list of all resources** linked to that contract.
 - → This includes staff, consultants, subcontractors, and any other associated personnel.
- 6. To find someone quickly:
 - Use the **search bar** at the top to search by name.
 - Use the filter option to filter by transaction category (e.g. Time, Expenses, Fees).
- 7. To view more information about a specific resource, **click on the profile icon** next to their name to open their profile.

How to Add a New Resource to a Contract

This section explains how to **add a person (resource)** to a contract so they can be linked to time, expenses, or work streams.

If the same person is working across **multiple projects**, you'll need to **repeat** this process for each one.

Steps to Add a New Resource

1. Go to the **left-hand sidebar** and click:

Work Management > Projects

- 2. Find and click on the **contract name** where you want to add the resource.
- 3. Inside the project, click on the **Project Resources** tab.
- 4. Click the **orange "Add new Resource"** button in the top-right corner.
- 5. A pop-up form will appear.
- 6. From the **dropdown list**, select the name of the person (resource) you want to add.
- 7. Select the **project name** again from the dropdown list (yes, you must reselect it here).
- 8. Enter the **employee sell rate**.
 - \checkmark Note: This should always be the hourly rate (not daily or monthly).
- 9. Choose the **Transaction Category**:

- ✓ Always select: Project-Fee
- 10. Use the calendar to select the **start date**.
- 11. Add a **description** if needed (this is optional).
- 12. Click Submit.
- 13. A success message will appear click **Okay** to confirm.
- 14. Use the **search bar** to find the new resource you just added.
- 15. The resource will now appear in the resource list for that project.

To Edit a Resource

- Find the resource in the list.
- Click the pencil icon under the Action column to edit details like rate or dates.

Having Trouble?

- If you see **red error messages**, it usually means the resource hasn't synced yet with Sage (our finance system).
- First, try clicking the **Refresh** button next to the error.
- If the error doesn't go away, take a screenshot and report it via the ChatBot.

How to Edit a Resource Linked to a Contract

This section explains how to update the details of a resource already linked to a contract.

Important: Do **not** change the project name from this screen. If the resource is already linked to time or expenses in PSA (old system), editing the project may cause data issues during audits.

Steps to Edit a Resource

1. In the **left-hand sidebar**, go to:

Work Management > Projects

- 2. Use the **search bar** or filters to find the contract/project.
- 3. Click on the relevant **contract name** to open it.
- 4. Go to the **Project Resources** tab.
- 5. Use the **search bar** to locate the resource you want to edit.
- 6. Click the **pencil icon** next to their name (under the "Action" column).
- 7. A pop-up edit form will appear.
 - ➤ Here you can update the resource's:
 - Start date
 - Rate
 - Transaction category
 - Description

(Remember: Do **not** change the project name here.)

- 8. Click the **Update** button when done.
- 9. A **success message** will appear click **Okay** to confirm.
- 10. The updated information will now appear in the resource list.

How to View Projects in a Contract

This section explains how to see all the individual **projects and workstreams** that sit inside a contract. This is useful for tracking structure, assignments, and

cost categories.

Steps to View Projects & Work streams Inside a Contract

1. In the **left-hand sidebar**, go to:

Work Management > Projects

- 2. Use the **search bar** or filters to find the contract you want to view.
 - → Once found, **click on the contract name** to open it.
- 3. Click on the **Projects & WorkStreams** tab.
 - → A structured list will open, showing:
 - All individual **projects** linked to the contract
 - All workstreams nested within those projects
- 4. To find something quickly:
 - Use the **search bar** at the top to look for a project by name.
- 5. To refine what you're seeing:
 - Use the **filter tool** to filter projects by **Transaction Category** (e.g. Time, Fees, Expenses).

You can explore project details and navigate into specific work streams from here.

How to Add a New Project Inside a Contract

This section explains how to add a new **project** within an existing contract. Every work stream must sit under a project, so it's important to set this up correctly.

Steps to Add a New Project

1. In the **left-hand sidebar**, click:

Work Management > Projects

- 2. Find and click on the **contract name** you want to add a project to.
- 3. Click the **Projects & WorkStreams** tab at the top.
- 4. Click the **Add Project** button (usually top-right).
- 5. In the pop-up form, fill in the following fields:
 - **Project Name**: Enter a clear, short name for the project.
 - Start Date: Select from the calendar.
 - End Date: Select from the calendar.
 - **Project Manager**: Choose from the dropdown list.
 - **Billing Type**: Choose from one of three options:
 - Time & Material Charges based on actual hours worked and materials used.
 - Fixed Fee A set price for the full project.
 - Fixed Fee & Expenses A set fee plus reimbursement for actual expenses.
 - **Status**: Select the current state of the project from the dropdown:
 - Not Started Project hasn't begun yet.
 - On Hold Temporarily paused.
 - Completed Fully finished.
 - Active Currently in progress.
 - Internal Internal/non-client project.

- **Description**: Optional include any notes or summary (if needed).
- 6. Once all fields are complete, click **Submit**.
- 7. A success message will appear. Your new project will now appear in the project list under the contract.

Troubleshooting Red Error Messages

If your newly added project shows **red error messages**, follow these steps:

- 1. Click the **three vertical dots** under the "Action" column next to the project.
- 2. Select Refresh.
- 3. Wait a few moments.
 - If the error clears all good.
 - If it doesn't disappear, please take a screenshot and report the issue via the ChatBot.

How to Add a Work stream to a Project

This section explains how to create a new **work stream** inside an existing project.

Each work stream allows time and expense tracking against specific tasks or phases within a project.

Steps to Add a New Work stream

1. In the **left-hand sidebar**, go to:

Work Management > Projects

- 2. Find and click on the **contract** where the project is located.
- 3. Click on the **Projects & WorkStreams** tab.
- 4. Use the **search bar or filters** to find the project you want to add a work stream to.
- 5. On the correct project row, click the **three dots** (:) under the **Action** column.
 - Select **Add Work stream** from the dropdown.
- 6. In the pop-up form, fill in the following fields:
 - Work stream Name: Give the work stream a clear and short name.
 - Work stream Approver: Select from the dropdown.
 - ➤ This person will approve **all time and expenses** logged against this work stream.
 - Planned Start Date: Use the calendar picker.
 - Planned End Date: Use the calendar picker.
 - Task ID:

This is **only required for EU projects**. If it's not relevant to your project, simply type **"0"** or another dummy number to proceed.

- Billable or Non-Billable: Choose one:
 - Billable Tasks chargeable to the client.
 - Non-Billable Internal or support tasks not charged to the client.
- **Status**: Choose the current state of the work stream:
 - Not Started Work hasn't begun.
 - Planned Scheduled but not started.

- In Progress Work is currently ongoing.
- Completed Fully finished.
- On Hold Temporarily paused.
- **Description**: Optional Add any notes if helpful.
- 7. Click **Submit** to save.
- 8. A **success message** will appear click **Okay** to confirm.
- 9. Your new work stream will now be visible under the relevant project.

Troubleshooting Red Error Messages

If red errors appear under your newly created work stream:

- 1. Click the **Refresh** button next to the work stream row.
- 2. Wait a few seconds to see if the error clears.
- 3. If the error does **not** disappear:
 - ➤ Take a **screenshot** and report the issue via the **ChatBot**.

How to Add Resources to a Work stream

This section explains how to assign people to a work stream so they can log time and expenses.

Make sure the resource has already been added to the **project** first before adding them to a **work stream**.

If not, go back and follow the steps to add them at the project level first.

Steps to Add a Resource to a Work stream

1. In the **left-hand sidebar**, go to:

Work Management > Projects

- 2. Find and click on the **contract** that contains the relevant project and work stream.
- 3. Click on the **Projects & WorkStreams** tab.
- 4. Use the **search bar or filters** to locate the **project** containing the work stream.
- 5. Click directly on the work stream name you want to add resources to.
- 6. Click on the **Add new Resource** button.
- 7. From the dropdown list, **select the employee** you want to assign to this work stream.
 - If their name doesn't appear, it likely means they haven't been added to the project yet.
 - Refer back to the "How to Add a Resource to a Project" section if needed.
 - Their cost rate will automatically appear, based on their projectlevel setup.
- 8. Set the **Transaction Category**:
 - Always select: Project-Fee
- 9. Choose the **planned start date** from the calendar.
- 10. Choose the **planned end date** from the calendar.
- 11. Enter the **planned hours** the resource will dedicate to this work stream.

Tip: Planned hours = Number of working days \times 8

- 12. Add a **description** (optional).
- 13. Click Submit.
- 14. A **success message** will appear click **Okay** to confirm.
- 15. The resource will now appear under the selected work stream.

Troubleshooting Red Errors

If a red error appears after adding the resource:

- 1. Click the **Refresh** button next to the resource row.
- 2. Wait a few seconds to see if the error disappears.
- 3. If it does not clear, take a screenshot and report it via the ChatBot.

How to Add an Expense Category Within a Work stream

This section explains how to set up expense categories within a specific work stream so that Associates can log expenses correctly.

Before doing this, make sure the Associate has already been assigned to the relevant project **and** work stream. Otherwise, they won't be able to bill to the expense.

Steps to Add an Expense Category

- 1. In the **left-hand sidebar**, go to: **Work Management > Projects**
- 2. Click on the **contract name** where you want to add the expense category.
- 3. Click on the **Projects & WorkStreams** tab.
- 4. Click on the **work stream name** where the expense category should be added.
- 5. Scroll down and click on the **Add Expense Category** button.
- 6. In the pop-up form, complete the following fields:
 - Transaction Category: Choose from the dropdown list.
 (This defines the type of expense e.g., Travel, Per Diem, Equipment)
 - Expense Name: Type a clear name (e.g., "Local Travel" or "Accommodation").
 - Planned Expense Amount: Enter the estimated amount you expect to be billed.
 - Planned Start Date: Choose from the calendar.
 - Planned End Date: Choose from the calendar.
 - **Description**: (Optional) Add any notes or explanations.
- 7. Click **Submit**.
- 8. A success message will appear, and the expense category will now be visible within the work stream.

You can add multiple expense categories per work stream if needed.

How to Change the Work stream Approver

This section explains how to update the **Work stream Approver**, the person responsible for approving all time and expenses submitted under that work stream.

Steps to Change the Work stream Approver

- 1. In the **left-hand sidebar**, go to:
 - **Work Management > Projects**
- 2. Use the **search bar or filters** to find the contract where the workstream sits.
 - Click on the **contract name** to open it.
- 3. Click on the **Projects & WorkStreams** tab.
- 4. Find the workstream where you want to change the approver.
- 5. On that workstream row, click the **three dots** (:) under the **Action** column.
- 6. Select **Edit** from the dropdown.
- 7. In the pop-up form:
 - Remove the current approver.
 - Select a new user from the **Workstream Approver** dropdown.
- 8. Click **Submit** to save the changes.
- 9. A success message will appear and the new approver is now active for that workstream.

Invoices

This chapter covers how to create, edit, submit, and manage both **Supplier** (AP) and Client (AR) invoices within the OS. It includes step-by-step guidance for Finance, Admin, and Project users involved in billing, approvals, and payment tracking as part of broader project and finance workflows.

Supplier Invoices

How to Edit Supplier Invoices

This section is for **Finance and Admin users** who need to make changes to supplier invoices that are still **in 'Submitted for Approval' status**.

Important: Once an invoice is approved, it can no longer be edited.

Steps to Edit a Submitted Supplier Invoice

- 1. In the **left-hand sidebar**, go to:
 - **Invoices > Suppliers**
- 2. Use the **search bar or filters** to find the invoice you want to edit.
 - ➤ You can filter by date, supplier name, status, or invoice number.
- 3. Once located, click on the **Action** button next to the invoice row.
- 4. Select **Edit Invoice** from the dropdown menu.
- 5. Update the invoice details that need to be changed (e.g., invoice number, dates, currency, etc.).
- 6. Click **Next** to proceed to the expense section.
- 7. On the **expense page**, you can:
 - Edit any existing expense lines
 - OR click **Add Expense Line** to include a new one
- 8. After making changes to any expense line, click **Save**.
- 9. Once all edits are complete, click **Next** to continue.

- 10. Review the updated invoice and expense summary.
- 11. Click **Submit** to finalise your changes.

Your updated invoice will now appear in the dashboard with the updated information.

How to Create a Draft Supplier Invoice

This section explains how **Finance and Admin users** can start an invoice and save it as a **draft** to return to later.

Steps to Create a Draft Invoice

1. In the left-hand sidebar, click:

Invoices > Suppliers

- 2. Click the **Add New Invoice** button at the top.
- 3. Fill in the invoice details.

Some fields are **mandatory** to allow saving as a draft. These usually include:

- Supplier
- o Invoice number
- Date
- Currency
- Amount
- 4. Once the minimum required fields are completed, click **Save as Draft** (not Submit).
- 5. Your invoice is now saved and can be found under the **Drafts** tab.
- 6. To view the saved draft, click on the **invoice entry** in the Drafts tab.
- 7. To continue editing the draft:
 - Click on Action
 - Then select Edit Invoice

You can return to the draft at any time until it is submitted for approval.

How to View a Supplier Invoice

This section explains how **Finance and Admin users** can view the full details of a supplier invoice, including attachments, expense lines, and comments.

Steps to View an Invoice

1. In the **left-hand sidebar**, go to:

Invoices > Suppliers

2. Use the **filters at the top** of the page to find the invoice you want to view.

You can filter by:

- Approved
- Submitted for Approval
- Resubmit
- Draft
- 3. Scroll through the filtered list or use the **search bar** to locate the exact invoice.
- 4. Click on the **invoice row** to open and view the invoice details.
- 5. On the invoice page, you can view:

- Supplier and invoice details (number, currency, amount, dates)
- Attached files (uploaded invoices or supporting documents)
- Expense lines linked to the invoice
- Current approval status
- 6. If needed, scroll to the bottom of the page to **add a comment for the approver**.
 - ➤ This is useful to provide context or flag anything specific to the reviewer.

That's it! You've successfully accessed and reviewed the full invoice details.

How to Submit a New Supplier Invoice

This section explains how **Finance and Admin users** can complete and submit a new supplier invoice, including uploading attachments, entering expense details, and ensuring the total matches the gross invoice value.

Step 1: Fill Out the Basic Info Page

- 1. In the **left-hand sidebar**, go to: **Invoices** > **Suppliers**
- 2. Click on the **Add New Invoice** button at the top.
- 3. On the **Basic Info** screen, complete the following fields:
 - Invoice Number Usually the Voucher Number from the document.
 - Invoice Date Use the calendar to select.
 - **Ticket Number** Enter the related **Zoho ticket number**.
 - **Vendor** Search and select the supplier linked to this invoice.
 - **Legal Entity** Choose the correct legal entity from the dropdown.
 - Tax Solution ID Appears after selecting the Legal Entity; choose the correct ID.
 - Percentage Tax Select the tax percentage from the dropdown.
 - Gross Invoice Total Enter the full total as shown on the voucher.
 - **Currency** Select the correct currency.
 - **Description** Typically the **general description** from the voucher.
- 4. Click Next to continue.

Step 2: Add Attachments, Expense Details & Submit

- 1. On the next screen, **upload any supporting documents** (usually the PDF voucher).
- 2. Click **Next** to move to the **Expense Details** page.
- 3. Complete the following fields for your first **expense line**:
 - Expense Name A short label for this expense item.
 - **Project** Search and select the project linked to the invoice.
 - Work stream Choose the correct work stream under that project.
 - **Expense Category** Select from the options available under that work stream.
 - Note: The Account field is pre-populated based on the Contract and cannot be edited.

- Amount Enter the exact value for this expense line.
 - ➤ All expense lines must add up exactly to the **Gross Invoice Total** from Step 1.
- Expense Tax Pre-filled from earlier, but you can edit it here if needed.
- **Description** Add the description from the voucher.
 - > Start the line with the Invoice Number.
- 4. Click **Save** to save the expense line.
- 5. A preview of the saved line will appear below.
 - ➤ You can duplicate, edit, or delete it using the icons.
- 6. If your invoice has **more than one expense line**, repeat steps 3–5 until the **Remaining Balance = 0**.
- 7. Once all expenses are entered and balanced, click **Next**.
- 8. On the **Review page**, check all details are correct.
 - ➤ You can go back to make changes by clicking **Back**.
- 9. When everything is correct, click **Submit** to send the invoice for approval.

Your supplier invoice is now submitted and will appear in the dashboard under the relevant status tab.

Client Invoices

How to Create a Client Invoice

This section explains how to create and submit an **Accounts Receivable (AR)** invoice for client billing. This process includes requesting invoice creation, adjusting billable items, and submitting for approval.

Steps to Create a Client (AR) Invoice

Step 1: Submit a Request to Generate an Invoice

1. In the **left-hand sidebar**, go to:

Project Management

- 2. Locate and click on the **project** for which you want to create a client invoice.
- 3. Click the **AR Invoices** tab within that project.
- 4. Click on the **Create AR Invoice** button.
- 5. In the pop-up form, enter a short **description**.
 - ➤ This is a note to the finance team explaining the purpose or scope of the invoice.
- 6. Click Submit Request.
- 7. Your request will now be generated.

Wait for your **Project Accountant** to review it and assign an official invoice number.

- While the request is being reviewed, the status will show as Request Pending.
- Once the invoice is generated, the status will update to Request Fulfilled.

Step 2: Adjust Line Items to Be Billed

- 1. Once your request status is **Request Fulfilled**, click the **Action** button next to the invoice.
- 2. Select **Process Invoice** from the dropdown.
- 3. You will land on the **Line Item Selection** page.
 - ➤ By default, **all line items** are marked as **billable**.
- 4. To exclude an item from billing:
- Click the **Edit** icon next to the line item.
- Open the **Bill Status** dropdown and select either:
 - To Be Billed Later to postpone invoicing
 - Write Off to remove the item from billing permanently
- 1. A pop-up will appear.
 - ➤ Add a **reason** for unbilling the line item and click **Submit**.
- 2. The item's status will update, and it will move to the **Unbilled Items List** tab.

You can also filter line items by project and work stream using the dropdown filters at the top.

1. Once you've removed any items you don't want to bill, click **Next**.

Step 3: Complete Invoice Details & Submit

- 1. On the **Invoice Details** page, enter the **Invoice Date**.
- 2. Add a clear **Invoice Description** (e.g., billing period, deliverables covered, etc.).
- 3. Upload any **attachments**, if needed (e.g., supporting documents or timesheets).
- 4. Click Next.

Step 4: Review, Share & Submit

- 1. Review your invoice on the **preview screen**.
- 2. Click **Share with Client** to open a form.
 - ➤ Fill in the client's contact details and click **Send Invoice**. (You can also click **Print Invoice** if you want to download or print a copy.)
- 3. Once you've reviewed everything, click **Submit for Approval**. Your invoice will now move to **Submitted for Approval** status and will be

reviewed by the relevant approvers.

How to Create a Supplier Invoice Number

This section explains how to generate and assign invoice numbers to supplier invoice requests by syncing between **SAGE** and the **AP Invoice** tab in the OS.

Steps to Create and Assign a Supplier Invoice Number

- 1. In the OS, go to the **AP Invoice** tab.
 - ➤ Here, you'll see a list of all supplier invoices where a **number generation request** has been submitted.
- 2. Log into **SAGE** and manually create invoice numbers for each request shown in the OS.
 - ➤ Follow your internal SAGE process for generating invoice numbers.

- 3. Return to the OS and go back to the AP Invoice tab.
- 4. For each pending request, **enter the corresponding invoice number** that you just created in SAGE.
- 5. Once the invoice number is added, the **status will automatically update** from **Request Pending** to **Request Fulfilled**.

The invoice is now ready to be processed further in the OS.

How to View or Edit a Draft Client Invoice

This section explains how to open, complete, and submit a **draft client (AR) invoice** saved under a contract in the OS.

Steps to View or Edit a Draft Invoice

- 1. In the **left-hand sidebar**, go to: **Project Management**
- 2. Click on the **contract/project** where the draft invoice is saved.
- 3. Click on the AR Invoices tab.
- 4. At the top of the screen, click the **Drafts** tab.
- 5. Find and click on the **draft invoice** you want to view or edit.
- 6. Complete any **missing details** on the invoice form:
 - Invoice number or reference
 - Invoice date
 - Line item selection (if applicable)
- 7. Add or update the **description** (if not already added).
- 8. Upload any attachments (e.g., supporting documents or timesheets).
- 9. Once all required fields are filled, click on Create Invoice.
- 10. Review your invoice, then click **Submit for Approval**.

Your draft is now submitted and will move to **Submitted for Approval** status.

Approvals

This chapter outlines how to review, approve, reject, or request changes across key submissions in the OS, including **Time Logs**, **Expense Logs**, **Output Logs**, **Purchase Orders**, **Supplier Invoices**, and **Client Invoices**. Approvers play a critical role in ensuring data accuracy, financial compliance, and workflow integrity. Once approved, submissions are locked and move forward in the system.

Time Logs

This section explains how approval managers review, approve, or request resubmission of time logs submitted by users. Time logs must be approved before a Purchase Order (PO) can be raised. Once approved, time entries are locked and cannot be edited.

Approving a Time Log

This section explains how to review and approve time logs submitted by users. Once approved, time logs are locked and cannot be reversed.

Steps to Approve a Time Log

1. In the OS, go to the **My Approvals** tab.

- 2. Click on the **Time Logs** tab to view all pending time log entries.
- 3. Use the **filters** at the top of the screen to search by:
 - Project
 - User
 - o Date range
 - Status
- 4. Click on the **time log entry** you wish to review.
- 5. A **pop-up window** will appear displaying the full details of the entry, including:
 - Date
 - Hours logged
 - Description
 - Workstream or project linked
- 6. Carefully review the information. If everything is correct, click **Approve**.

A warning will appear asking you to confirm all details are accurate, as approved time logs cannot be reversed.

- 1. If you're certain, click **Confirm**.
- 2. A **success message** will appear in the top-right corner, and the time log's status will update to **Approved**.

The person who submitted the time log will receive an email confirmation, and they can now raise a **Purchase Order (PO)** linked to the approved time.

Requesting Resubmission of a Time Log

This section explains how an **approval manager** can return a submitted time log to the user for correction and resubmission.

Steps to Request a Time Log Resubmission

- 1. In the OS, go to the **My Approvals** tab.
- 2. Click on the **Time Logs** tab to view submitted entries.
- 3. Use the **filters** to find the specific time log needing changes.

You can filter by:

- Project
- User
- Date range
- Status
- 4. Click on the **time log entry** you want to review.
- 5. A **pop-up window** will open showing the time log details.
- 6. In the **comment box**, explain what needs to be corrected (e.g., wrong hours, incorrect description, wrong workstream).
- 7. Scroll to the top of the pop-up and click the **Resubmit** button.
- 8. A **confirmation message** will appear in the top-right corner, and the time log's status will update to **Resubmit**.

The submitter will receive an **email notification** asking them to edit and resubmit the time log.

Expense Logs

This section explains how to review, approve, or return submitted **expense logs** for correction. Expense logs must be approved before reimbursement or payment processing can occur. Once approved, they are locked and cannot be changed. Approval managers are responsible for verifying accuracy, checking receipts, and ensuring expenses are linked to the correct project and work stream.

How to Approve an Expense Log

This section explains how to review and approve a submitted **expense log** (also referred to as an **output log**) through the OS approval system.

Once approved, expense logs cannot be reversed — always double-check the details before confirming.

Steps to Approve an Expense Log

1. In the **left-hand sidebar**, go to:

My Approvals

- 2. Click on the **Output Logs** tab.
- 3. Use the **filters** to search for the relevant expense log.
 - ➤ You can filter by:
 - Project
 - Submitter
 - o Date range
 - Status
- 4. Click on the **expense log entry** you want to review.
- 5. Carefully **review the details** of the submission:
 - Expense amount
 - Expense category
 - Linked project and work stream
 - Line description
 - Olick on the attachment icons to view the uploaded receipt or voucher.
- 6. If everything is correct, click the **Approve** button.

A warning will appear reminding you that this action is final and cannot be undone.

- 1. Click **Confirm** when you're absolutely sure all details are accurate.
- 2. The expense log will now appear in your list as **Approved**.

The submitter will be notified and can proceed with any further actions (e.g. reimbursement or PO creation).

How to Ask the Submitter to Resubmit an Expense Log

This section explains how to send an **output (expense) log** back to the submitter when something needs to be corrected before approval.

Steps to Request Resubmission of an Expense Log

1. In the **left-hand sidebar**, go to:

My Approvals

2. Click on the **Output Logs** tab.

- 3. Use the **filters** at the top to search for the expense log.
 - ➤ Filter by project, submitter, date range, or status.
- 4. Click on the **expense log entry** to open it.
- 5. Review the submitted details carefully:
 - Check amounts, category, project/work stream
 - Olick on the attachment icons to view uploaded receipts or vouchers.
- 6. In the comment box, **add a clear explanation** of what needs to be fixed.
 - ➤ Example: "Please update the description to include travel dates," or "Receipt is missing please upload."
- 7. Click on the **Resubmit** button at the top.
- 8. A confirmation message will appear in the **top-right corner**. If you didn't leave a comment earlier, you can still add it now to ensure the submitter knows what to change.

The submitter will receive an **email notification** informing them that the expense log needs to be corrected and resubmitted.

Output Logs

This section explains how to review, approve, or return **Output Logs**, which record key project deliverables, milestones, or activities completed by team members. Approvers are responsible for verifying that the submitted outputs are accurate, complete, and properly documented before approval. Once approved, output logs are final and cannot be reversed.

How to Approve an Output Log

This section explains how to review and approve a submitted **Output Log**. These logs often relate to deliverables, activities, or milestones recorded within a project.

Once approved, output logs cannot be undone — always double-check the details before confirming.

Steps to Approve an Output Log

1. In the **left-hand sidebar**, go to:

My Approvals

- 2. Click on the **Output Logs** tab.
- 3. Use the **filters** at the top to narrow down logs by:
 - Project
 - Submitter
 - Status
 - Date range
- 4. Click on the **output log entry** you want to review.
- 5. Carefully review the details of the submission:
 - Deliverable type
 - Date and duration (if applicable)
 - Linked project/work stream

- Description and supporting details
- Any attached files
- 6. If everything is correct, click the **Approve** button.

A warning message will appear reminding you that this action is final and cannot be reversed.

- 1. A **confirmation message** will appear in the **top-right corner**.
- 2. The approved log will now appear in your **Approved list**.

The submitter will receive a notification confirming their output log has been approved.

How to Ask the Submitter to Resubmit an Output Log

This section explains how to send a submitted **Output Log** back to the user for correction when information is missing, inaccurate, or needs clarification.

Steps to Request Resubmission of an Output Log

1. In the **left-hand sidebar**, go to:

My Approvals

- 2. Click on the **Output Logs** tab.
- 3. Use the **filters** to search for the output log you need to return.
 - ➤ Filter by project, submitter, status, or date range.
- 4. Click on the **output log entry** to open the submission.
- 5. Review the details carefully to identify what needs to be corrected.
- 6. In the **comment box**, explain clearly what the submitter should fix.
 - ➤ Example: "Please include a clearer description of the deliverable" or "Missing document attachment."
- 7. Click on the **Resubmit** button.
- 8. A **confirmation pop-up** will appear in the top-right corner if the request was successful.

If you didn't enter a comment before clicking Resubmit, you can still add it afterwards.

The submitter will receive an **email notification** letting them know they must edit and resubmit the output log.

Purchase Orders

This section explains how approvers review, approve, or request changes to **Purchase Orders (POs)** submitted by users. POs are used to authorise billing against approved time or expenses and must be approved before they can be used for invoicing. Once approved, POs are locked and cannot be edited.

How to Approve a Purchase Order (PO)

This section explains how to review and approve a **Purchase Order invoice** submitted for your approval. Once approved, the PO becomes active and usable by the requester.

Steps to Approve a Purchase Order

- 1. In the **left-hand sidebar**, go to:
 - My Approvals
- 2. Click on the Purchase Orders tab.

- 3. Locate the PO you want to review and click on the **View Details** icon next to it.
 - ➤ This opens a pop-up with all the relevant PO information.
- 4. Carefully review the Purchase Order details, including:
 - Resource name
 - Linked project or workstream
 - Duration, rate, and total amount
 - Description or justification (if provided)
- 5. If everything is accurate, click the **Approve** button at the bottom of the pop-up.
- 6. The status of the PO will automatically update to **Approved** and the requester will be notified.

The PO is now active and can be used for billing and tracking purposes.

Supplier Invoices

This section explains how to review, approve, or return **Supplier Invoices (AP Expenses)** submitted for payment. Approvers are responsible for checking that invoice details, supporting documents, and expense breakdowns are accurate and complete. Once approved, supplier invoices move forward for processing and payment and cannot be reversed.

How to Approve Supplier Expenses

This section explains how to review and approve (or reject) supplier expense invoices submitted through the AP workflow. Approvers should check all invoice and expense details before confirming.

Steps to Approve a Supplier Expense

1. In the left-hand sidebar, click on:

My Approvals

- 2. Click on the **AP Expense** tab at the top.
- 3. Find the supplier invoice you want to review.
 - ➤ You can use filters to narrow your search by status, vendor, or project.
- 4. Click on the invoice entry.
 - ➤ A pop-up window will open showing invoice details.
- 5. Carefully **review the invoice header details**, such as:
 - Supplier name
 - Invoice number and date
 - Gross total
 - Description
- 6. If needed, add a comment for the submitter (optional).
- 7. Click the **dropdown arrow** to expand and view the **expense breakdown**.
- 8. Review each **expense line** to ensure:
 - Correct project and work stream
 - Accurate amount
 - Valid expense category

- Linked receipts or attachments (if applicable)
- 9. If everything looks correct, click **Approve**.

The invoice will move to the next stage in processing and its status will update automatically.

Client Invoices

This section explains how to review, approve, or reject **Client Invoices** (**Accounts Receivable**) submitted for billing. Approvers are responsible for verifying that invoice details, attachments, and billable line items are accurate and complete before approval. Once approved, the invoice can be shared with the client and tracked for payment.

How to Approve a Client Invoice (AR)

This section explains how to review and approve (or reject) a **Client Invoice** submitted for approval under Accounts Receivable (AR). Approvers are responsible for validating the accuracy of the invoice before confirming.

Steps to Approve or Reject a Client Invoice

- 1. Go to the AR Invoices Dashboard in the OS.
- 2. Locate the invoice you need to review and click the **View** icon under the **Action** column.
- 3. The full **invoice details** will open in a pop-up window.
 - ➤ Carefully check the following:
 - Invoice number and date
 - Client name
 - Project/work stream
 - Description and billing period
 - Attached documents
 - Line items and totals
- 4. If needed, type a **comment** in the comment box to explain anything to the submitter.
- 5. Once reviewed, click either:
 - Approve if all details are correct
 - **Reject** if there are issues that require resubmission or correction
- 6. After your decision, click the **X** (**Close**) icon to return to the **AR Invoices Dashboard**.
- 7. The invoice status will automatically update to either **Approved** or **Rejected** based on your action.

The submitter will receive a system notification with your decision and any comments you added.

Re-Contracting (this is to be reviewed)

Re-Contracting Core & Non-Core Staff – User Guide

Step 1: Determine Re-Contracting Scenario

Is the re-contracting within or beyond 90 days?

• < 90 Days: Follow the simplified re-contracting flow.

• > 90 Days: Full onboarding flow is re-triggered.

Re-Contracting < 90 Days

Step-by-Step:

- 1. Go to People Management
- 2. Search and click on the relevant user
- 3. Go to Profile → Issue a New Contract
- 4. Add Role and Staff Type
 - Core or Non-Core
 - Assign correct role (e.g., Project Manager, Analyst)
- 5. Add remaining contract details
- 6. Assign Contract for Signature:
 - Either assign it to someone else
 - Or sign it yourself
- 7. Contract Signature Triggers:
 - Email goes to assigned signatory
 - They access it via email or My Approvals > Contracts
- 8. Contract is signed
- 9. System triggers email to user
 - Email valid for 24 hours
 - User can click the link or enter the manual code

10. User logs in > Onboarding Screen appears

User Onboarding Flow (Post-Signature)

- 1. User signs into OS from link
- 2. Completes the following forms:
 - Ethics & Compliance Declaration
 - Expression of Wish
 - Conflict of Interest
 - Bank Details (incl. BSB if AU)
- 3. Click Next → Preview Contract Summary & TOR
- 4. Send Contract to people@adamsmithinternational.com for review
- 5. Add Comments if required (internal only)
- 6. Press Submit
- 7. User receives credentials (if needed):
 - ASI Email created
 - View Credentials (email & Microsoft password)
- 8. Click 'Complete Onboarding with Microsoft Credentials'
- 9. Login to Microsoft Portal
- 10. Setup Authenticator (skip allowed for 14 days)
- 11. Final screen: Welcome onboard
- 12. User lands on OS profile screen

Re-Contracting > 90 Days

Step-by-Step:

- 1. Go to People Management
- 2. Search and click on the relevant user

- 3. Go to Profile → Issue a New Contract
- 4. Add Role and Staff Type
 - o Emergency info, references, disclaimers must be re-filled
- 5. Add other contract details
- 6. Assign Contract for Signature
 - o Either assign it to someone else or sign it yourself
- 7. Contract flow and onboarding mirrors full onboarding process
 - Email triggers to signee
 - Email then triggers to user post-signature
 - User completes all forms and validation steps

Additional Checks:

- Confirm status of previously filled forms
- Re-trigger form completion if necessary

Notes & Best Practice

- **Declined Profiles:** Users that had a contract but didn't sign must be treated as new users.
- **Credential Emails:** If Microsoft email is already filled in, it will be retained.
- If first time onboarding: Status will automatically switch from *Auth-In Progress* to *Onboarding Complete*.
- Internal Comments: Use "Add Comments" field for context (visible to those with access).
- Communicate with HR & IT: Especially when new email or hardware is required.

ASI OS Off-boarding

Welcome to the OS Off-boarding. Choose the guide that fits the user type you are off-boarding. Each section contains clear step-by-step instructions and tips for a smooth off-boarding process.

1. Introduction to Offboarding

What it is: Offboarding is the process used to end someone's access to the ASI Operating System (OS) when their contract is ending. It ensures that the user is properly removed from projects and systems, and allows them to finish final tasks like logging time or submitting expenses.

What's new in version 2:

- Automatic emails at 30 and 14 days before contract ends
- Offboarding sheets are now auto-created
- Users get 90-day grace period post-expiry
- Support for multiple offboarding sheets
- Clearer status tracking for expired contracts and dashboard KPIs

2. Who Gets Offboarded and When?

Who:

- Core and Non-Core Staff
- Associate Consultants (ACs) and Subcontractor Consultants (SCs)

When: Offboarding is triggered automatically **30 days** before the user's contract end date.

- Core & Non-Core follow the same process
- ACs & SCs follow a slightly different but similar flow

3. Automatic Email Triggers and Notifications

At -30 Days: System sends an email reminder.

At -14 Days: Second email + Offboarding sheet is created.

Email goes to:

Staff Type	Email Sent To
Core/Non-Core	User, Line Manager, P&T
AC/SC	User, PM/PD

4. How the Offboarding Sheet Is Created

At **14 days before contract ends**, the system:

- Creates an Offboarding Sheet automatically
- Assigns it to relevant people for action
- Triggers Exit Survey (if applicable)

The offboarding sheet helps you wrap up duties, plan exits, and track actions.

5. Exit Surveys, Reassignment & Checklist Items

The system will:

- Trigger an exit survey for the leaver
- Ask managers to reassign any direct reports

Important: The system will **NOT** automatically:

- Reassign approval rights
- Transfer responsibilities

You must do these manually.

6. Offboarding Day: What Happens on the Last Day?

On the contract end date:

- The user's contract status = Expired
- The user is officially **offboarded**

Their profile and access update automatically in the OS.

7. 90-Day Grace Period After Offboarding

Even though the user is offboarded:

- They can log time and submit expenses for 90 more days
- They sign in with their **personal email**

They'll see a countdown: "89 days remaining" at the top of their screen.

After 90 days:

- Access ends
- If recontracted, a new ASI email is created

8. How to View Offboarding History

Go to the user's profile:

- 1. Open **People Directory**
- 2. Click View Profile
- 3. Open the Offboarding tab

You'll see:

- Current offboarding sheet (if any)
- Past offboardings
- Their contract status (Active, Expired, etc.)

9. Recontracting During the Grace Period

If a user returns within 90 days:

- Just issue a new contract
- The system **reactivates** their profile
- No need to create a new email or start onboarding again

After 90 days:

• A new profile/email will be created

10. Multiple Contracts & Rate Variations

If a user has:

- Multiple contracts in OS: System handles offboarding
- One or more contracts **not** in OS: X Manual coordination is required **Coming soon:** Ability to manage multi-rate contracts directly in OS.

11. Cancelling an Offboarding

Sometimes, you may need to cancel an offboarding:

- The person is staying
- The end date changed

To cancel:

- 1. Go to User Profile
- 2. Open Offboarding Tab
- 3. Click Cancel Offboarding

12. Project Leadership Dashboard View

PDs and PMs will see an "Offboarding" KPI widget:

- It shows **only** Overdue & In Process offboardings
- If the number isn't zero, action is required

P&T has a separate dashboard to track all staff offboarding.

13. Special Cases: Retainer Associates

For associates who only work occasionally (e.g. 2 days/year):

- You can issue a long contract with max days limit
- Or offboard, and recontract yearly (but that creates a **new email**)

Final guidance on cost/licensing impacts is pending.

14. Support & Resources

If you need help:

- Use the **Gleap Help Chat** (bottom right of screen)
- Watch the **demo video** in Help Centre
- Read the full User Guide Collection
- Follow **Storylines** in Teams for tips
- Ask support in your project group