HR DELIVERY / STEP-BY-STEP SERIES

Your Client Documents

L1

PORTAL USER GUIDE

Receive your project documents with clear access, project selection, version checks and a practical handover. Separate staff chapters explain the preparation, release, reception and commercial workflows behind the client collection.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

Use the workspace with a clear purpose

Start with the client instructions if you are receiving HR Delivery work. The department sign-in is the first stage; a private collection has its own client reference and access code. Your collection contains material the delivery team has released for your organisation.

The client collection shown here is HR Delivery's published synthetic demonstration. The sign-in, Maha support and appointment-request screens were inspected directly. Staff document preparation and commercial administration are separate protected workspaces; the corresponding chapters are labelled for authorised staff and use source-described process checkpoints where private controls were unavailable.

WHO THIS GUIDE IS FOR

Client sponsors and authorised recipients • HR Delivery document preparers and reviewers • Authorised reception and commercial administrators

WHAT YOU CAN DO

01 Open the correct private collection

02 Find documents by project and identify their editions

03 Download released documents and follow up precisely

04 Prepare a focused support or appointment request

05 Understand authorised staff preparation, release and administration

CONTENTS

In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

Introduction 002
Foreword from Dr Phillip 004
Meet Lama 005
Sign in and check your access 006
Your workflow map 010
Client access and your document collection 011
Get help and request a discussion 028
Authorised staff: prepare and release client documents 041
Authorised staff: customers, membership and billing 066
Authorised staff: business documents and communication 079
Reference directories and checklists 108
Your final check 113
Help and support 114

FOREWORD

A note from Dr Phillip

A good handover makes the right document easy to find, the edition easy to identify and the next action easy to understand.

DR PHILLIP

HR Delivery

A client deliverable becomes useful when people can find it, understand its purpose and know which edition to use. Clear access and a considered handover are part of the work itself. They connect the report, plan or tool with the decisions the organisation needs to make.

This guide begins with the client collection and takes you through access, project selection, version checks and support. It then explains the staff workflow that prepares and releases the material. Keeping those responsibilities explicit helps everyone work from the same document and understand what remains in preparation.

Use the steps to build a disciplined handover: confirm the project, identify the document, read the notes and agree the next action. If something is unclear, Lama can coordinate the right conversation and Maha’s service information helps you frame the question. Our intention is that every deliverable arrives with enough context for your team to put it to practical use.

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama is your first point of contact for enquiries, documents and appointments. She can help connect a question with the relevant project team, clarify which access route you need and arrange a discussion. Give her the organisation, project, document title and version where known. Keep passwords and private collection codes out of ordinary messages and screenshots.

ASK LAMA TO HELP WITH

- Clarify the correct portal or collection
- Coordinate a document or access enquiry
- Arrange an appointment request
- Connect you with the responsible project colleague

HAVE THESE DETAILS READY

- Organisation and project name
- Document title and version if available
- What you are trying to do
- Preferred contact route and timing

OPEN LAMA'S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–2 OF 6

OPEN SOURCE

Sign in and confirm your workspace

01 Open the portal link

Use the link supplied in your HR Delivery access handover. Check that the portal title matches the service you need.

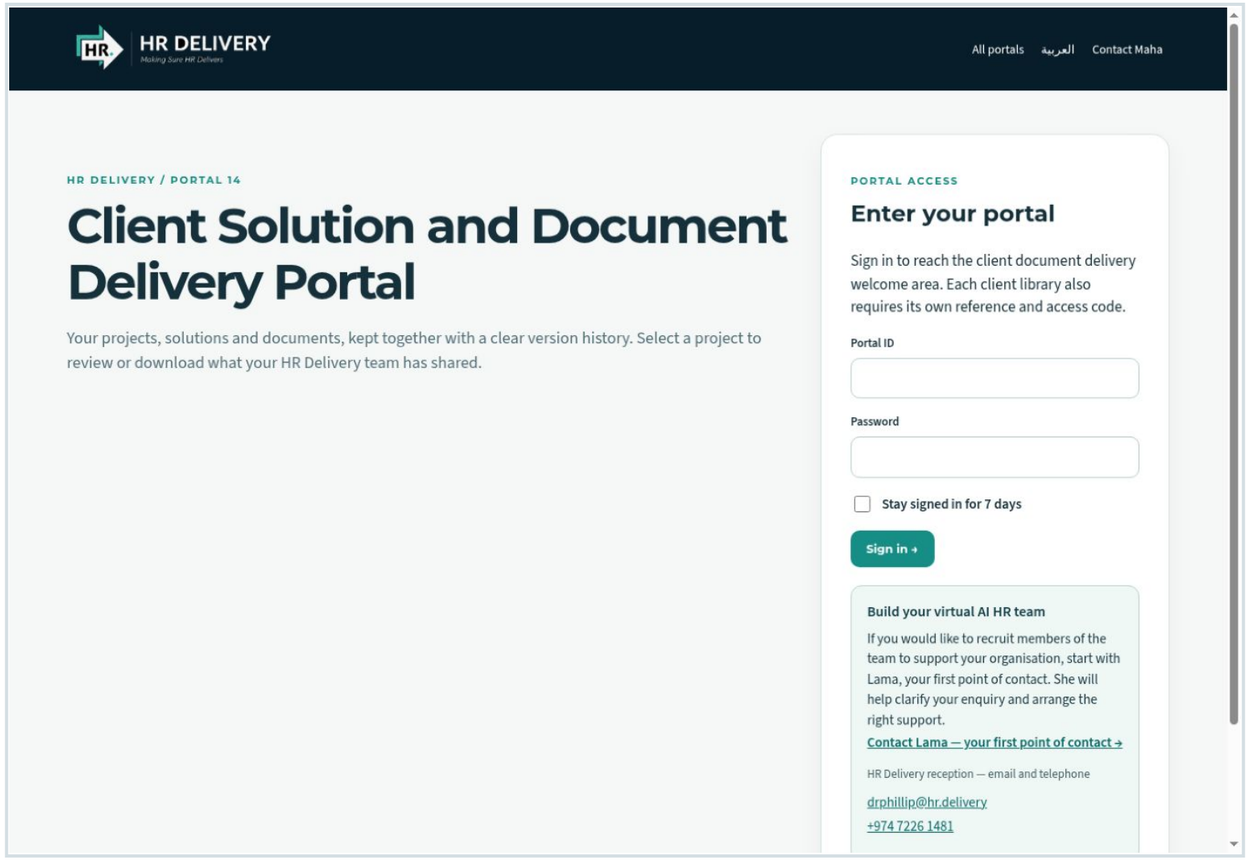
CHECK The correct portal title and sign-in form are visible.

02 Enter your 'Portal ID'

Type the ID issued for your service into 'Portal ID'. Keep the spelling and letter case exactly as provided.

CHECK The ID appears in the intended field.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

SIGNING IN / STEPS 3–4 OF 6

OPEN SOURCE

Sign in and confirm your workspace

03 Enter your 'Password'

Enter the password issued through your agreed access route. Do not include it in a support screenshot or in a shared document.

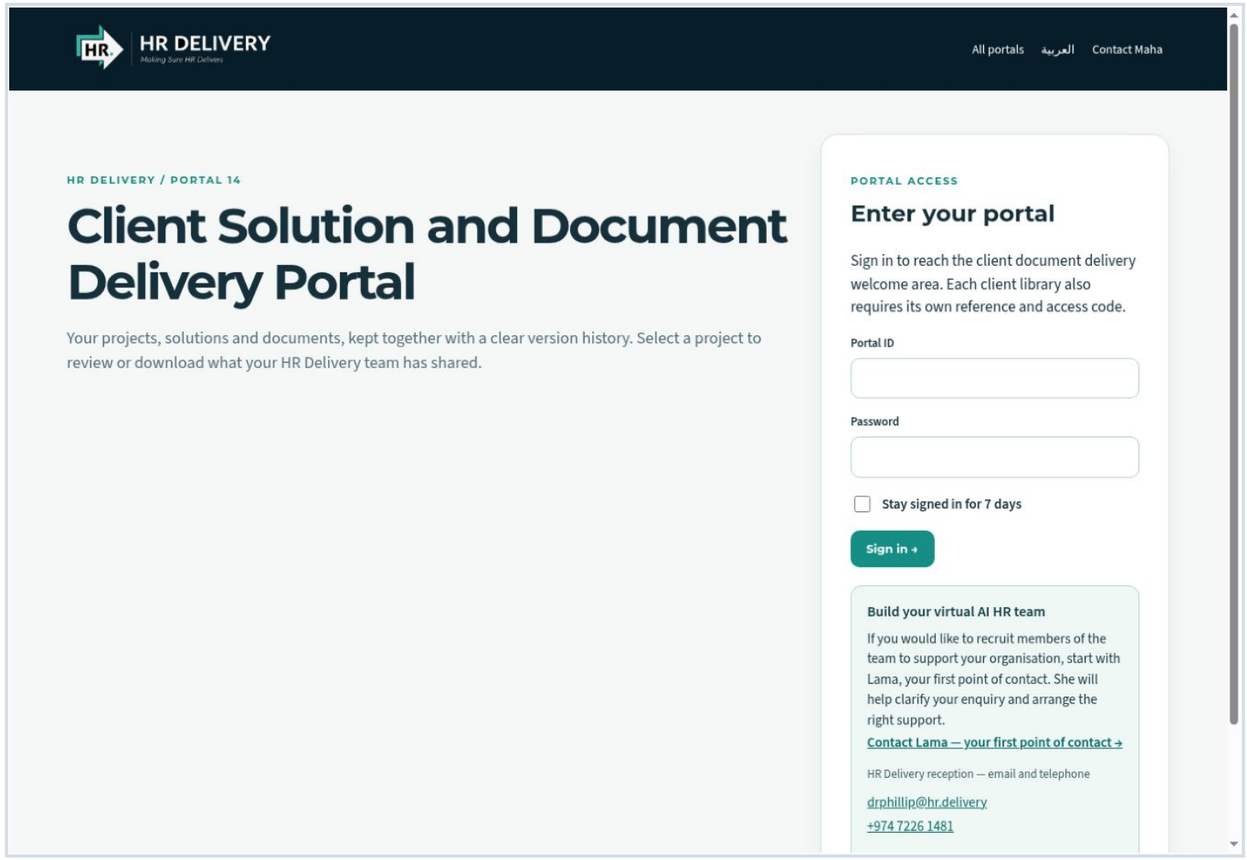
CHECK The password field is completed without exposing the credential.

04 Choose the session option

Use 'Stay signed in for 7 days' only if appropriate for the device you control. Leave it unticked on shared equipment.

CHECK The optional checkbox reflects your intended session duration.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

SIGNING IN / STEPS 5–6 OF 6

OPEN SOURCE

Sign in and confirm your workspace

05 Select 'Sign in →'

Continue through the normal sign-in process. Confirm the service name and your authorised workspace before opening any records.

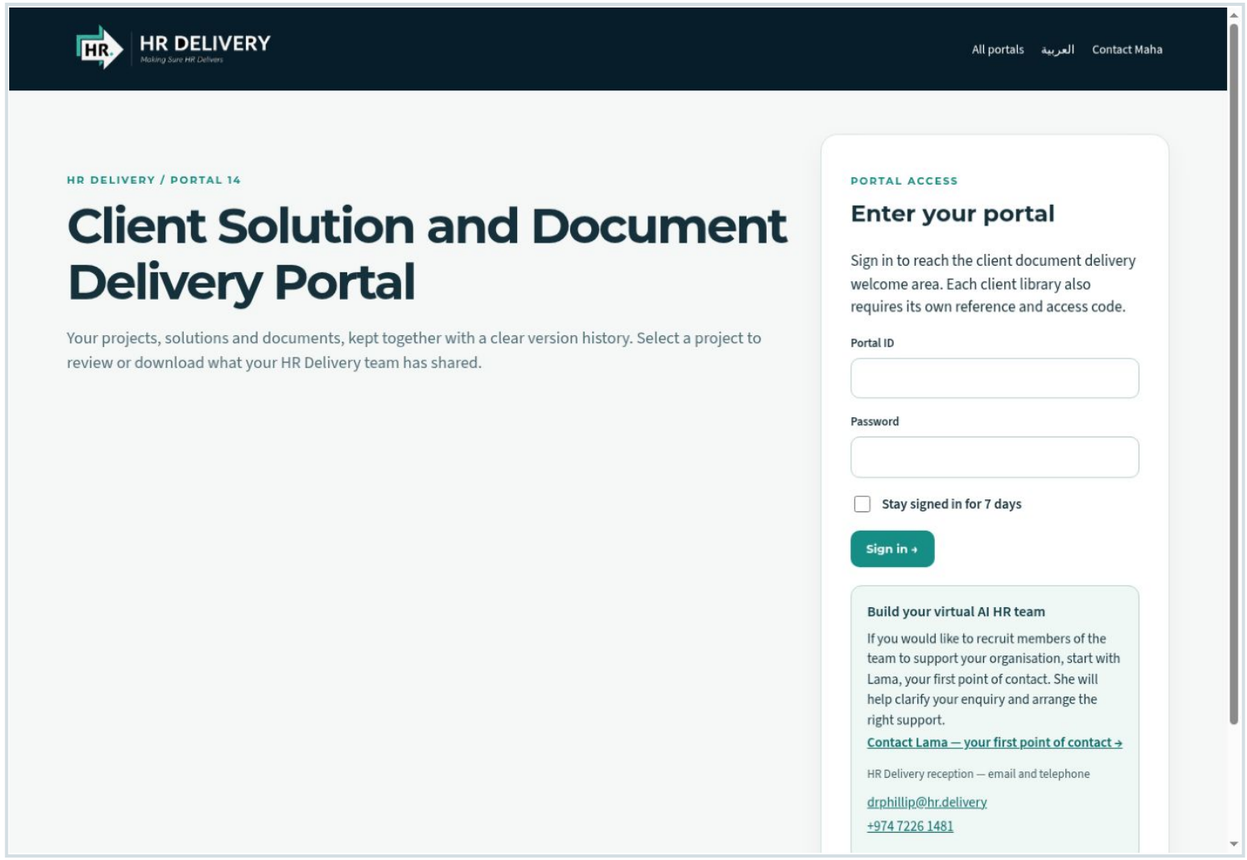
CHECK If accepted, the workspace opens; authenticated success was not verified in this review.

06 Check your permitted work

Confirm the organisation, country and role that apply to your work. A department sign-in does not automatically grant every private administration function.

CHECK The available modules should match the access agreed with HR Delivery.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Client collection: use the issued client reference and separate collection access code after the welcome stage.

02 Staff document preparation: requires a separate authorised staff account.

03 Connected Workspace reception and commercial records are restricted staff functions.

The current review reached this sign-in screen but did not obtain an authenticated private session. Public workflows and published demonstrations are identified separately throughout this guide.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01

Client access and your document collection

PAGE 011

02

Get help and request a discussion

PAGE 028

03

Authorised staff: prepare and release client documents

PAGE 041

04

Authorised staff: customers, membership and billing

PAGE 066

05

Authorised staff: business documents and communication

PAGE 079

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01

Client access and your document collection

Use the correct collection and identify what has been released.

04 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / L-01-01

OPEN SOURCE

Open your private client collection

Reach the organisation’s released project material using the correct access handover.

WHO USES THIS Authorised client recipient

BEFORE YOU BEGIN

- Portal link from HR Delivery
- Issued client reference
- Separate collection access code

WHAT YOU WILL HAVE

- Access to the intended client collection

CHECK BEFORE YOU FINISH

- Correct client reference and collection code
- Organisation checked before opening files
- Client and staff access remain distinct

The department sign-in works but the collection does not open.	Check that you are using the separate client reference and collection code issued for this library. Ask Lama or the project team to confirm the handover; do not send the code in a screenshot.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The published client demonstration shows the collection. A real private client collection and its credential-entry step were not entered.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 1–2 OF 5

OPEN SOURCE

Open your private client collection

01 Check the access handover

Locate the portal link, client reference and collection access code provided for the project. The department password, specialist-service code and client collection code serve different purposes.

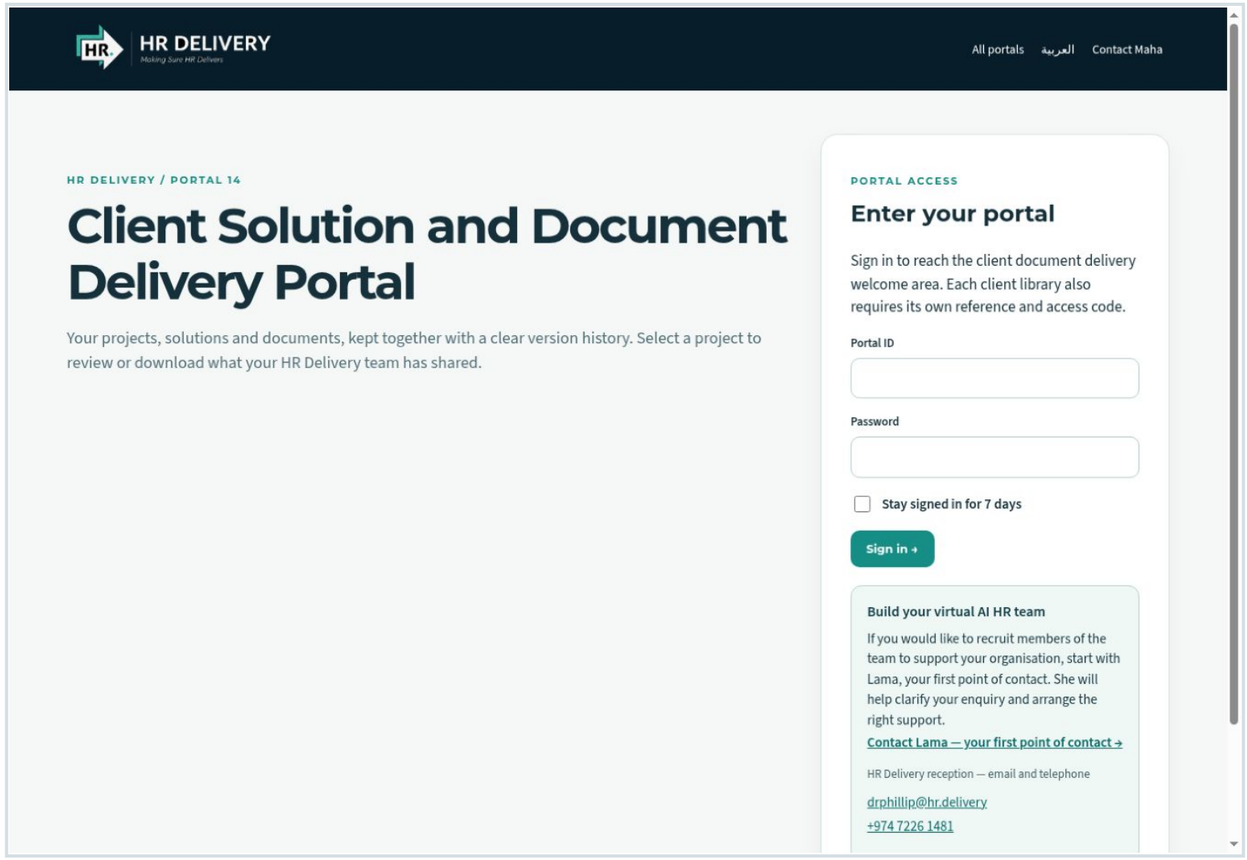
CHECK You have the access details for this particular collection.

02 Complete the department sign-in

Follow the sign-in page at the beginning of this guide. Check that the title is Client Solution and Document Delivery Portal.

CHECK If accepted, the portal welcome stage opens.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 3–4 OF 5

OPEN SOURCE

Open your private client collection

03 Enter the collection details when requested

Use the exact client reference and its associated collection access code. The public portal description confirms this separate private entry; its post-sign-in field labels were not inspected.

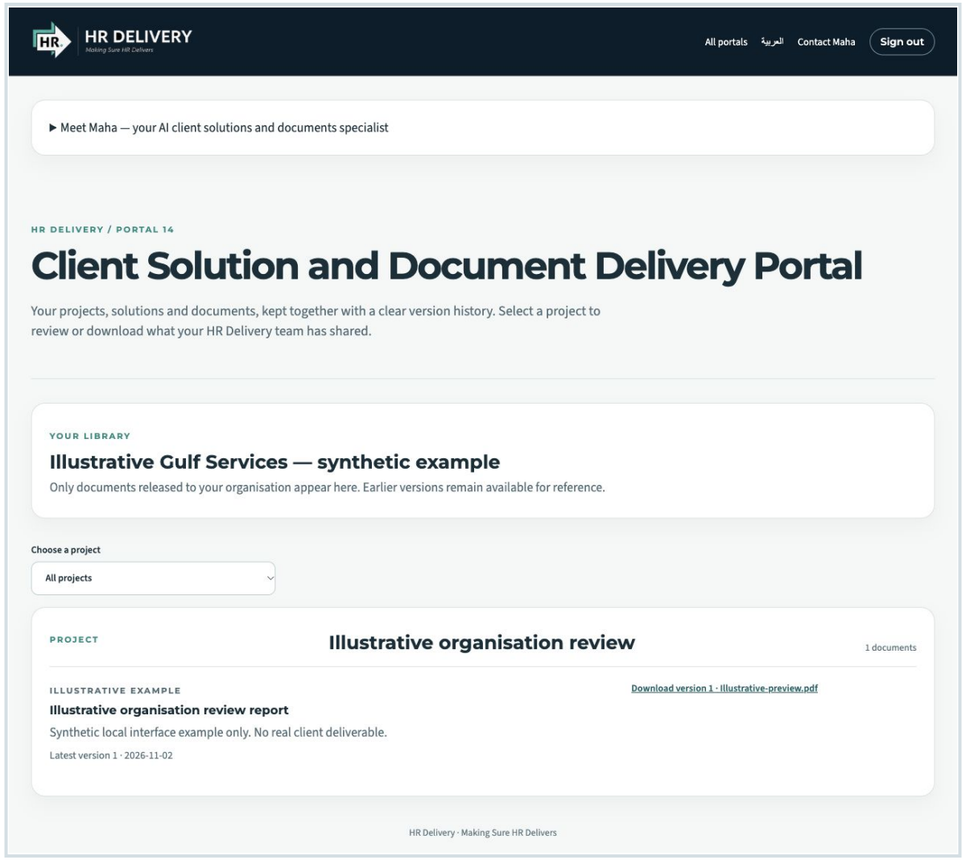
CHECK Checkpoint: the authorised collection should open for the intended client.

04 Confirm the organisation

Check the collection heading before opening files. If it does not match the organisation or project you expect, stop and contact the delivery team.

CHECK The client identity and your assignment agree.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 5–5 OF 5

OPEN SOURCE

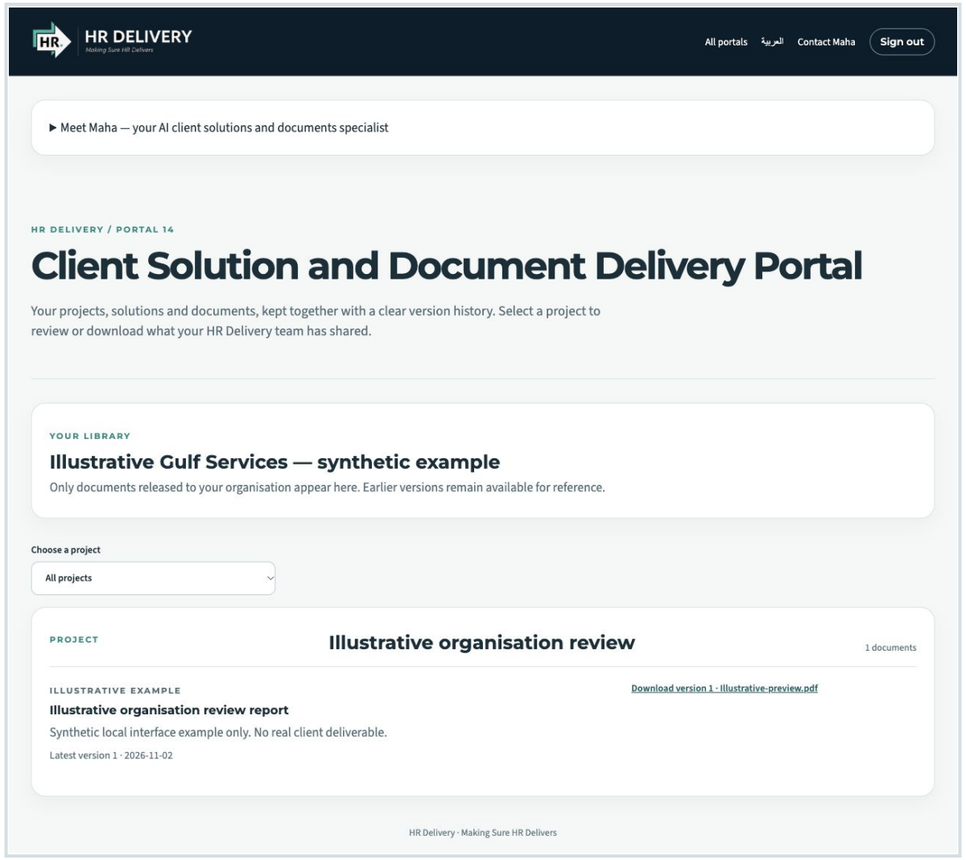
Open your private client collection

05 Review the available projects

The published demonstration shows Choose a project and an All projects option. Use the project that matches your handover.

CHECK The collection is organised around the work released for the client.

PUBLISHED DEMONSTRATION



HR Delivery’s complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / L-01-02

OPEN SOURCE

Find a project and inspect a document card

Locate the deliverable and understand what you are about to open.

WHO USES THIS Authorised client recipient

BEFORE YOU BEGIN

- Opened client collection
- Project or document name

WHAT YOU WILL HAVE

- Selected project and document reference

CHECK BEFORE YOU FINISH

- Project, title and version agree with the handover
- Notes reviewed before relying on the file

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The project selector and version-specific card are shown in the published synthetic demonstration; live client filtering was not exercised.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 1–2 OF 5

OPEN SOURCE

Find a project and inspect a document card

01 Use 'Choose a project'

Select the relevant project. Use All projects when you need to see the wider collection or cannot remember the assignment name.

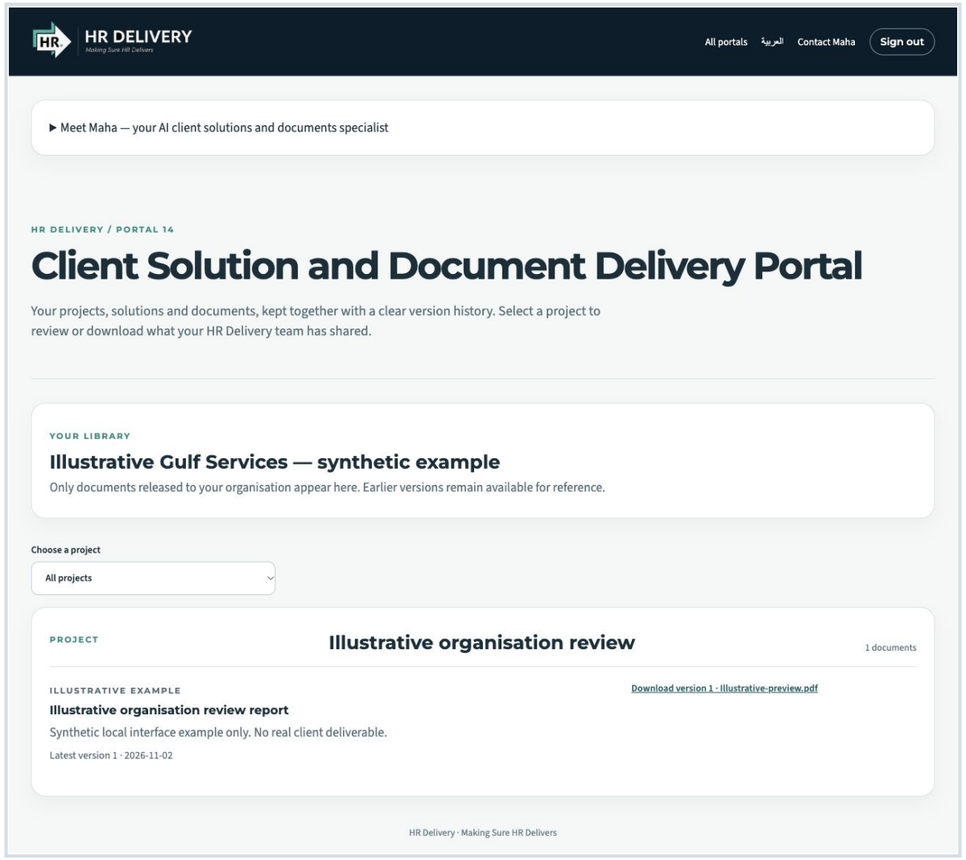
CHECK The document view reflects the selected project.

02 Read the project heading

Confirm the project name against the delivery handover. The demonstration shows an illustrative organisation review rather than a live client project.

CHECK You are reviewing the right assignment.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 3–4 OF 5

OPEN SOURCE

Find a project and inspect a document card

03 Check the document title and category

Use the title to identify the deliverable and the category to understand its type. Similar report titles may belong to different assignments.

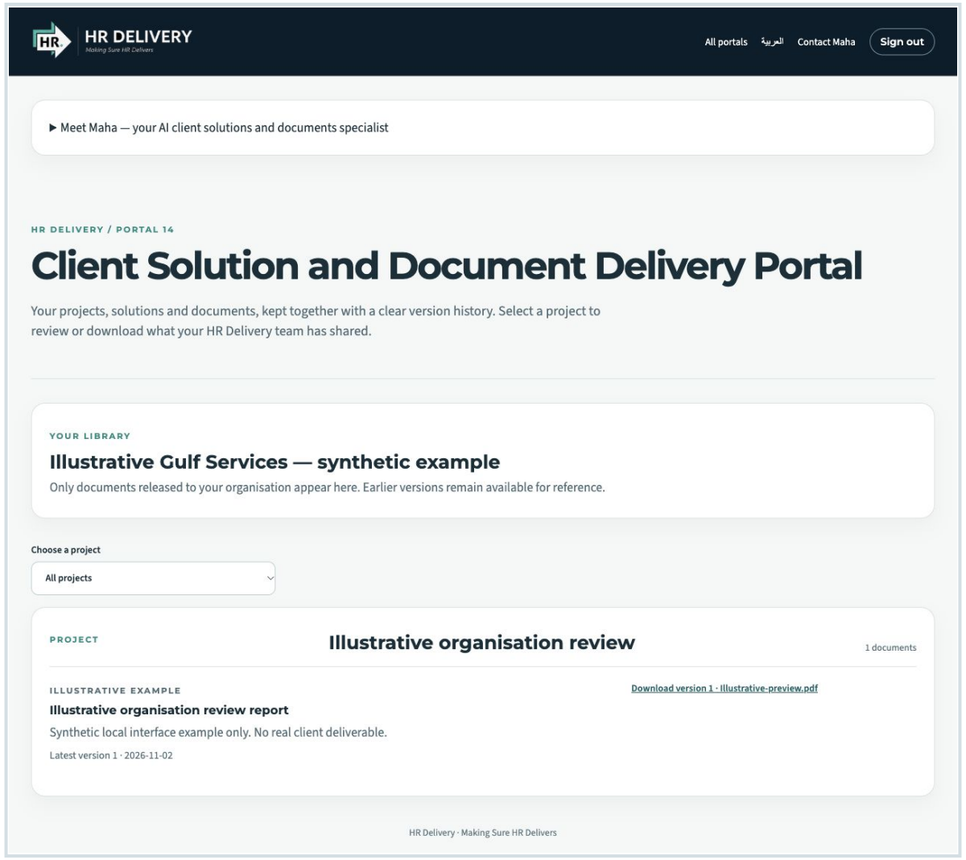
CHECK The selected document matches the material you need.

04 Read the notes and edition

Review the explanatory notes, latest version and update date. Notes can explain the document’s status or the action expected from you.

CHECK The version and purpose are clear before download.

PUBLISHED DEMONSTRATION



HR Delivery’s complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 5–5 OF 5

OPEN SOURCE

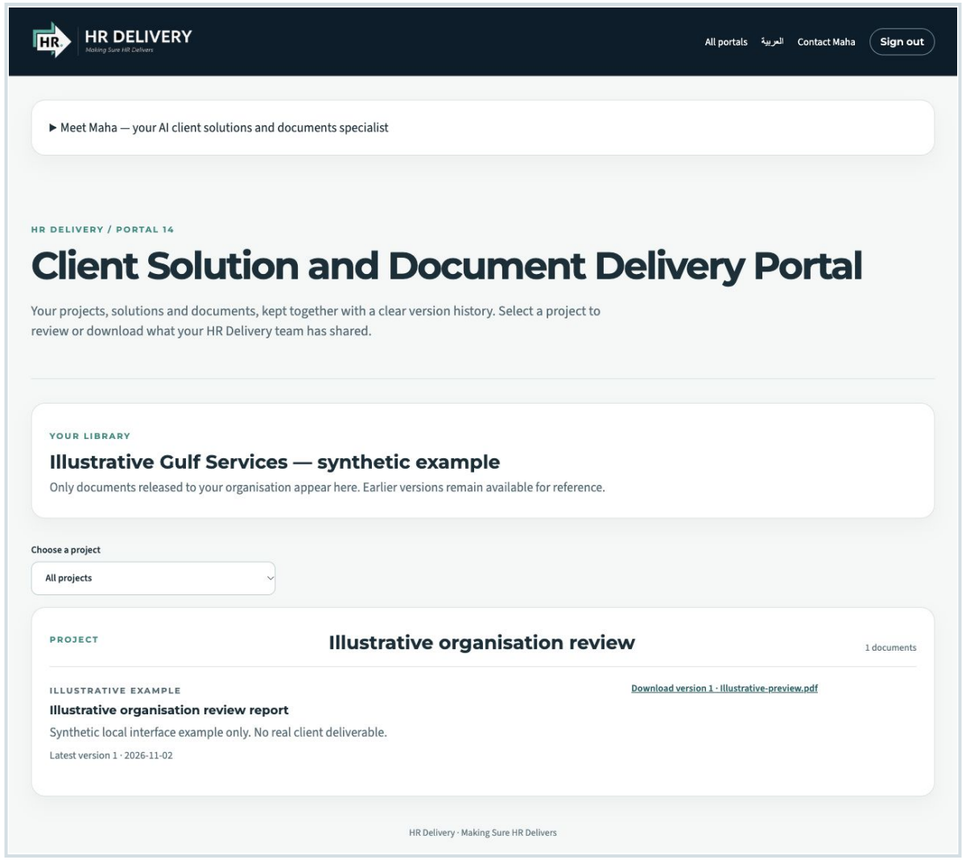
Find a project and inspect a document card

05 Record the reference for follow-up

Use the project name, full document title and version in any question to HR Delivery. Describe the page, worksheet or section concerned.

CHECK A colleague can identify the same edition without guessing.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / L-01-03

OPEN SOURCE

Download the intended edition and check it

Keep a usable copy of the released document with its version context.

WHO USES THIS Authorised client recipient

BEFORE YOU BEGIN

- Selected document card
- Approved device and storage location

WHAT YOU WILL HAVE

- Version-specific downloaded file
- Clear handover reference

CHECK BEFORE YOU FINISH

- Correct version and file type
- Entire file opens successfully
- Earlier releases are clearly identified

The file does not download or appears to be the wrong edition.	Check the selected project and version, then report the exact title, version and error wording to the project team. Do not repeatedly download unidentified copies.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

No private client file was downloaded. The version-specific control is visible in the published synthetic collection.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 1–2 OF 6

OPEN SOURCE

Download the intended edition and check it

01 Identify the required version

Start with the latest released edition unless the project team has asked you to review an earlier one. Read the notes before choosing.

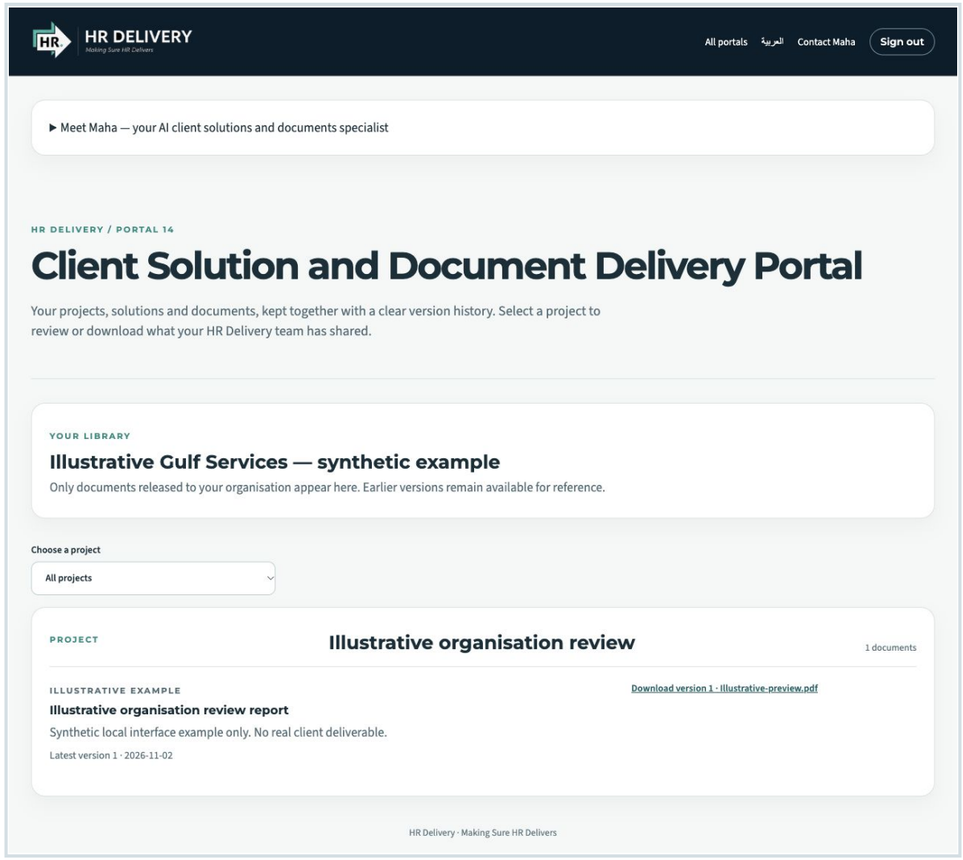
CHECK The edition is selected deliberately.

02 Use the version-specific download

The published demonstration shows Download version 1 followed by the filename. Use the corresponding download on your actual document card.

CHECK Checkpoint: the browser downloads the selected file.

PUBLISHED DEMONSTRATION



HR Delivery’s complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 3–4 OF 6

OPEN SOURCE

Download the intended edition and check it

03 Open the downloaded file

Check the filename, cover or document title, version and date. Confirm that the complete file opens in the appropriate application.

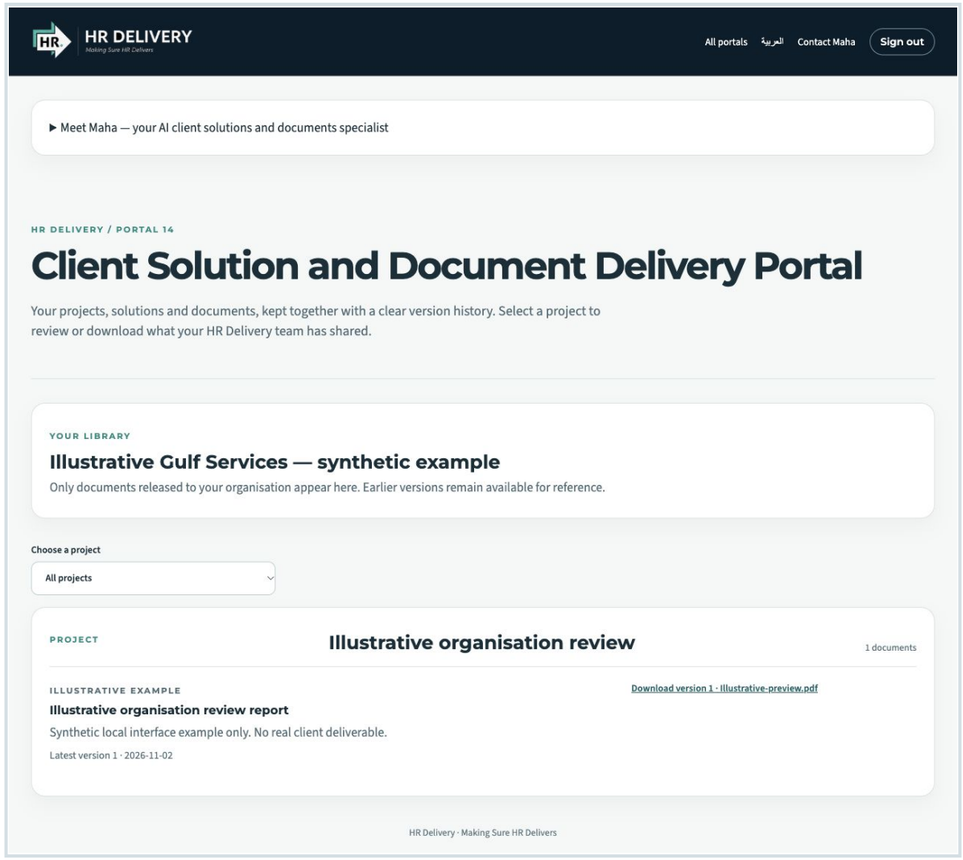
CHECK The file is readable and matches the intended edition.

04 Review the handover instructions

Read the executive summary, usage notes and any actions identified by the delivery team. For a workbook, check the instructions before entering data.

CHECK You understand how the deliverable is intended to be used.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 5–6 OF 6

OPEN SOURCE

Download the intended edition and check it

05 Retain the version context

Store the copy according to the organisation's document rules. Keep the version in the name or accompanying register; avoid an unlabelled collection of copies.

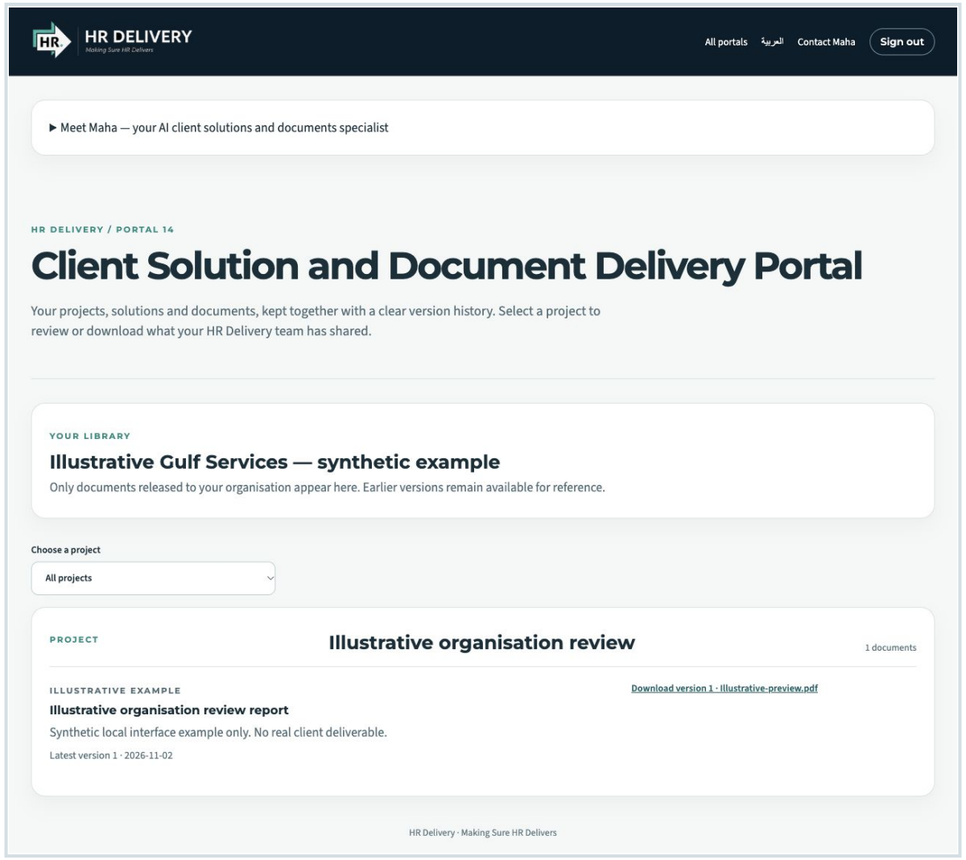
CHECK Colleagues can distinguish the current working edition.

06 Use earlier versions carefully

The service description provides access to earlier released editions. Select the edition required and identify it clearly in any comparison or follow-up.

CHECK The older file is treated as a historical edition rather than the current recommendation.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / L-01-04

OPEN SOURCE

Resolve missing documents or an access change

Give the team enough information to investigate the right collection and release.

WHO USES THIS Authorised client recipient

BEFORE YOU BEGIN

- Project and expected document
- Handover date or reference

WHAT YOU WILL HAVE

- Focused release or access enquiry

CHECK BEFORE YOU FINISH

- Filter checked before escalation
- Release and preparation stages distinguished
- No password or code included in the enquiry

The screen does not match this guide.	Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Release and access administration remain staff responsibilities; no code or permission was changed.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 1–2 OF 5

OPEN SOURCE

Resolve missing documents or an access change

01 Check the project selection

Return to All projects if the expected file is absent from the current project filter. Review the relevant project heading again.

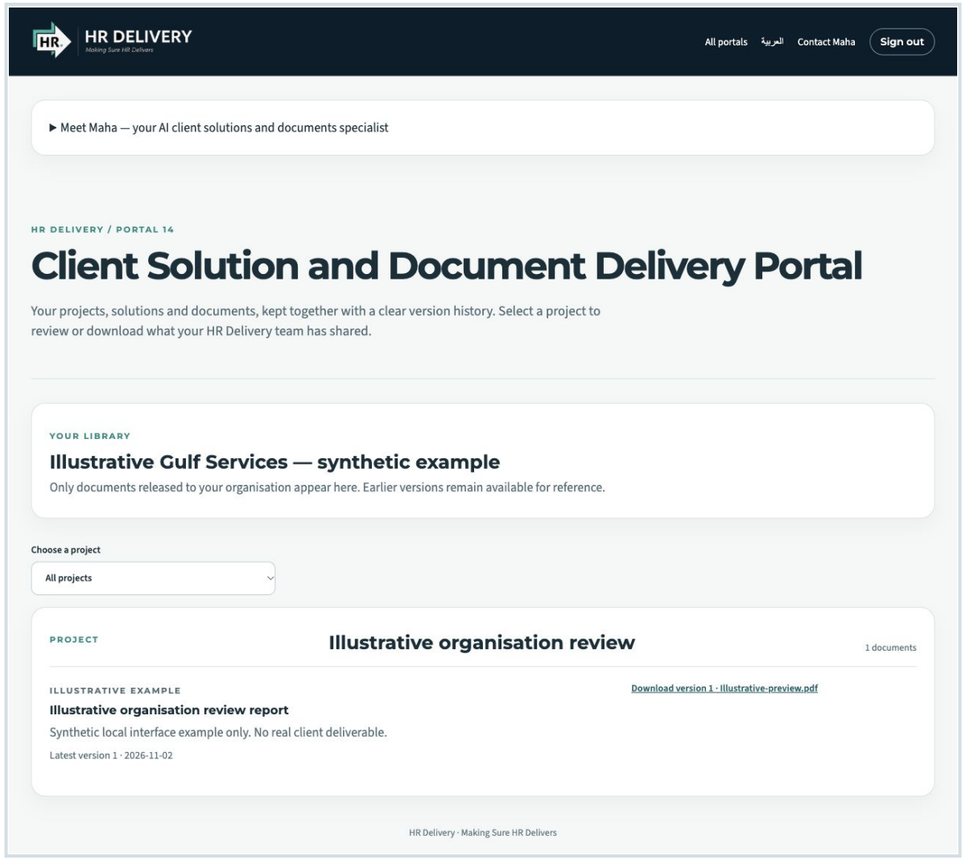
CHECK A filter mismatch is ruled out.

02 Check the release context

The collection contains material released by HR Delivery staff. A working draft or planned deliverable may not yet be available to clients.

CHECK The expected file's preparation and release stages are distinguished.

PUBLISHED DEMONSTRATION



HR Delivery's complete published synthetic client collection; no real client deliverable is shown.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 3–4 OF 5

OPEN SOURCE

Resolve missing documents or an access change

03 Prepare a precise enquiry

State the client, project, expected document, known version and the point where access stops. Include an error message without exposing codes or private records.

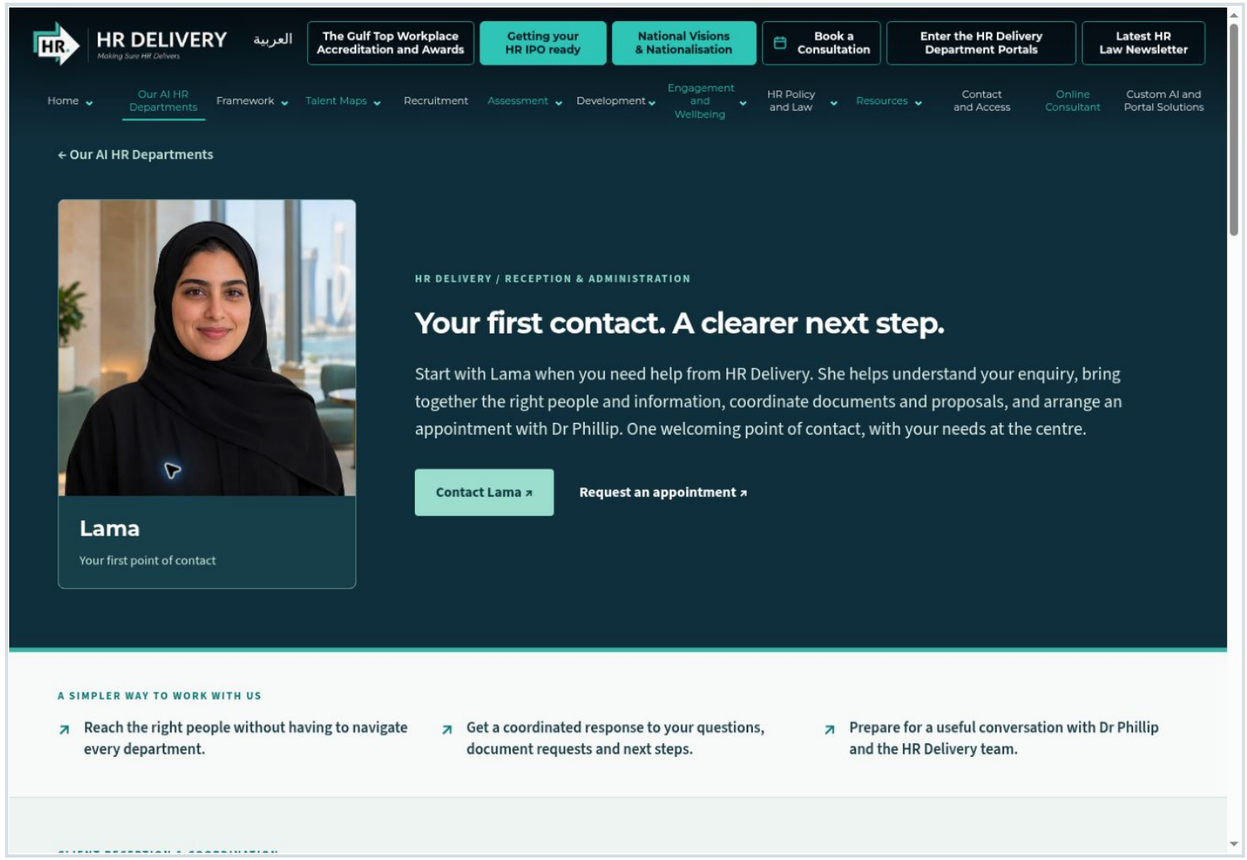
CHECK The team can locate the relevant assignment and access issue.

04 Contact Lama or the project team

Use the agreed support route to confirm availability, correct reference or a required access update. Ask who is responsible for the next action.

CHECK A specific support request reaches the responsible team.

PRIOR REVIEWED SCREEN



Public reception and administration overview supporting the staff workflow context.

CLIENT ACCESS AND YOUR DOCUMENT COLLECTION / STEPS 5–5 OF 5

OPEN SOURCE

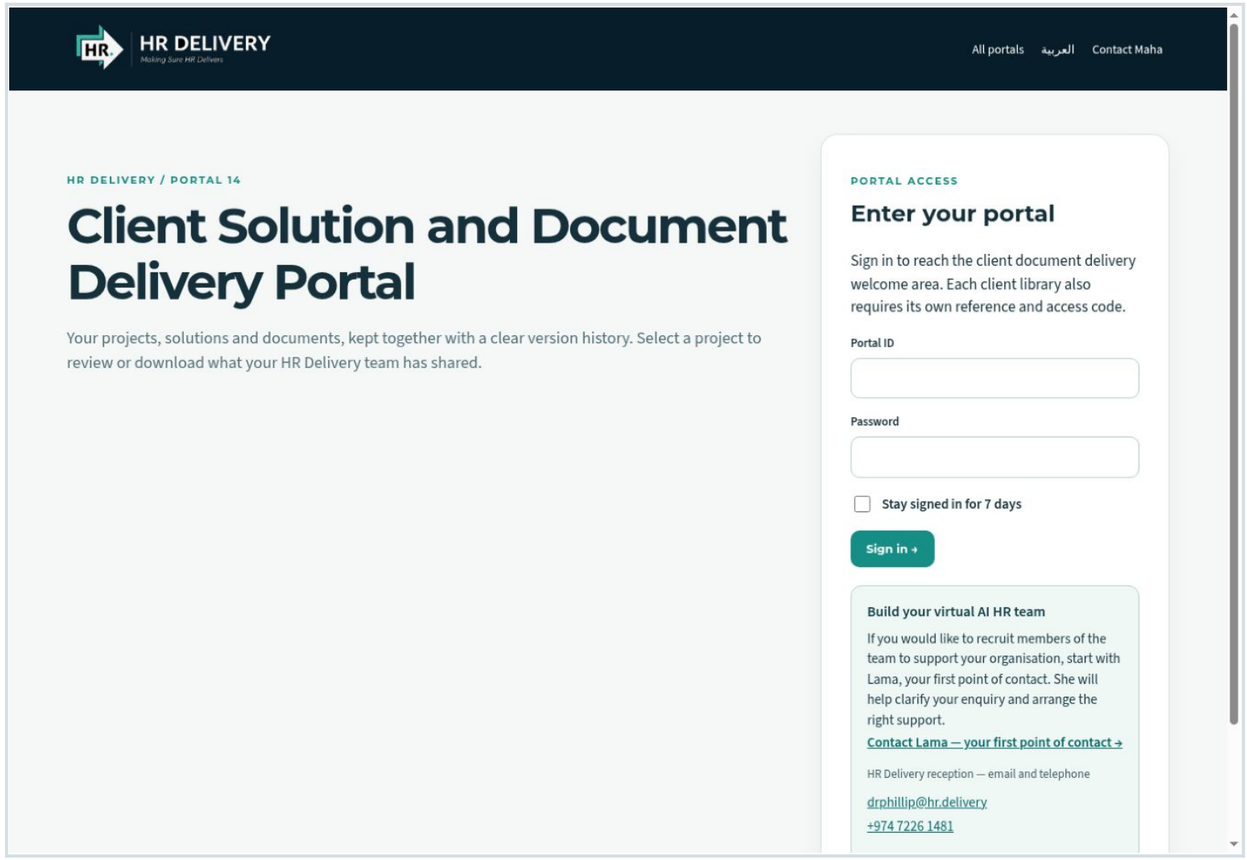
Resolve missing documents or an access change

05 Use replacement access details only when issued

If the collection code is rotated, follow the new handover through the agreed route. Do not assume an old saved session or shared code remains valid.

CHECK Checkpoint: the correct recipient can access the intended collection with current details.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

02

Get help and request a discussion

Prepare a focused enquiry and understand the appointment process.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

GET HELP AND REQUEST A DISCUSSION / L-02-01

OPEN SOURCE

Use Maha’s document-support information

Frame a question about collections, versions or the handover.

WHO USES THIS Client recipient or project coordinator

BEFORE YOU BEGIN

- Project context
- A specific navigation or handover question

WHAT YOU WILL HAVE

- Focused document-support brief

CHECK BEFORE YOU FINISH

- Specialist access distinguished from portal access
- No confidential record or credential included
- Active channel confirmed

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The current page provides communication interfaces and preparation prompts; live Maha replies were not active or verified.

GET HELP AND REQUEST A DISCUSSION / STEPS 1–2 OF 5

OPEN SOURCE

Use Maha’s document-support information

01 Choose 'Contact Maha'

Use the link from the client portal or the HR Customer Service department. Read the Client Solutions and Document Collections Specialist description.

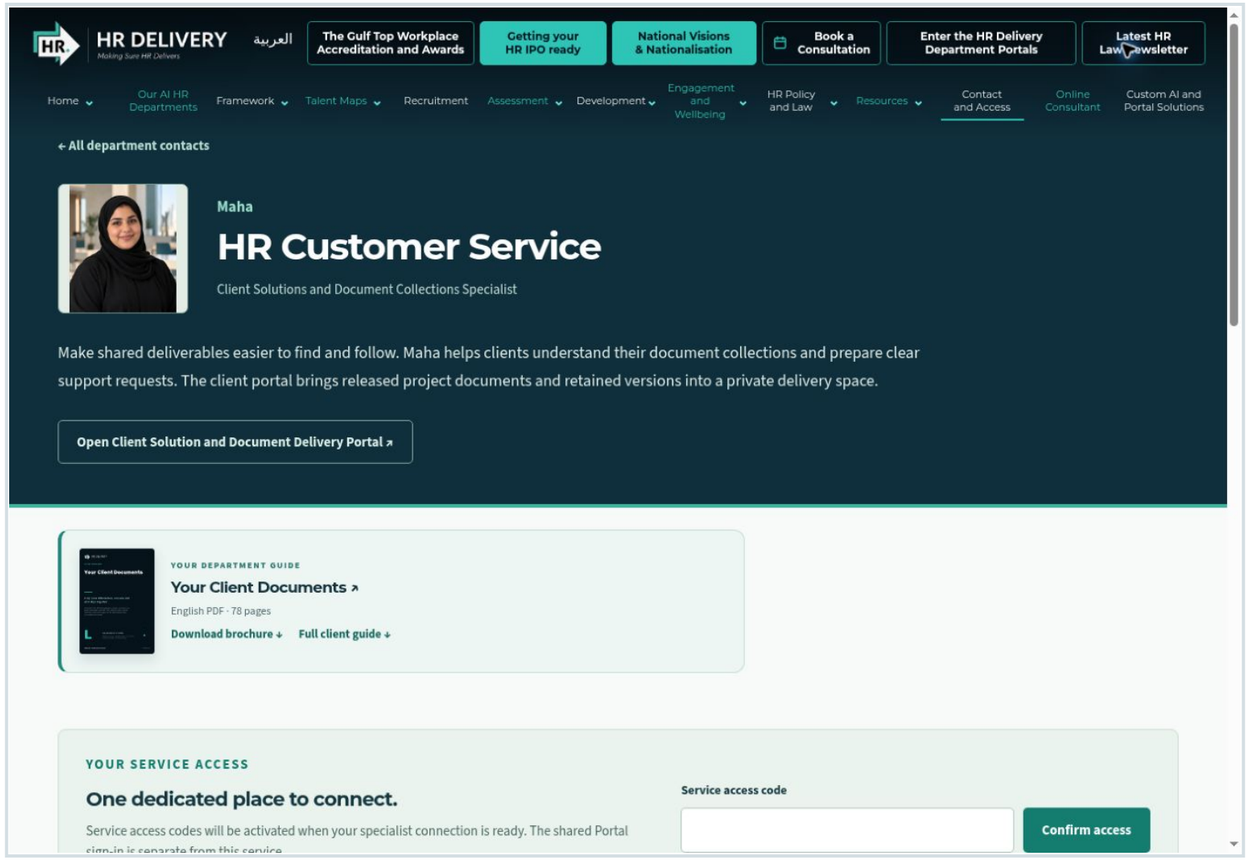
CHECK The Maha service page opens.

02 Check service access separately

Read the Service access code area. The page explains that specialist connections and access codes are activated separately from department sign-in.

CHECK You know whether the communication service is available for your access.

CURRENT LIVE SCREEN



Current Maha service page introduces client-document support and the separate service-access route.

GET HELP AND REQUEST A DISCUSSION / STEPS 3–4 OF 5

OPEN SOURCE

Use Maha’s document-support information

03 Review the 'AI chat' prompts

The visible examples cover planning a collection, organising versions and preparing a clear question for the HR Delivery team. Choose the topic that matches your need.

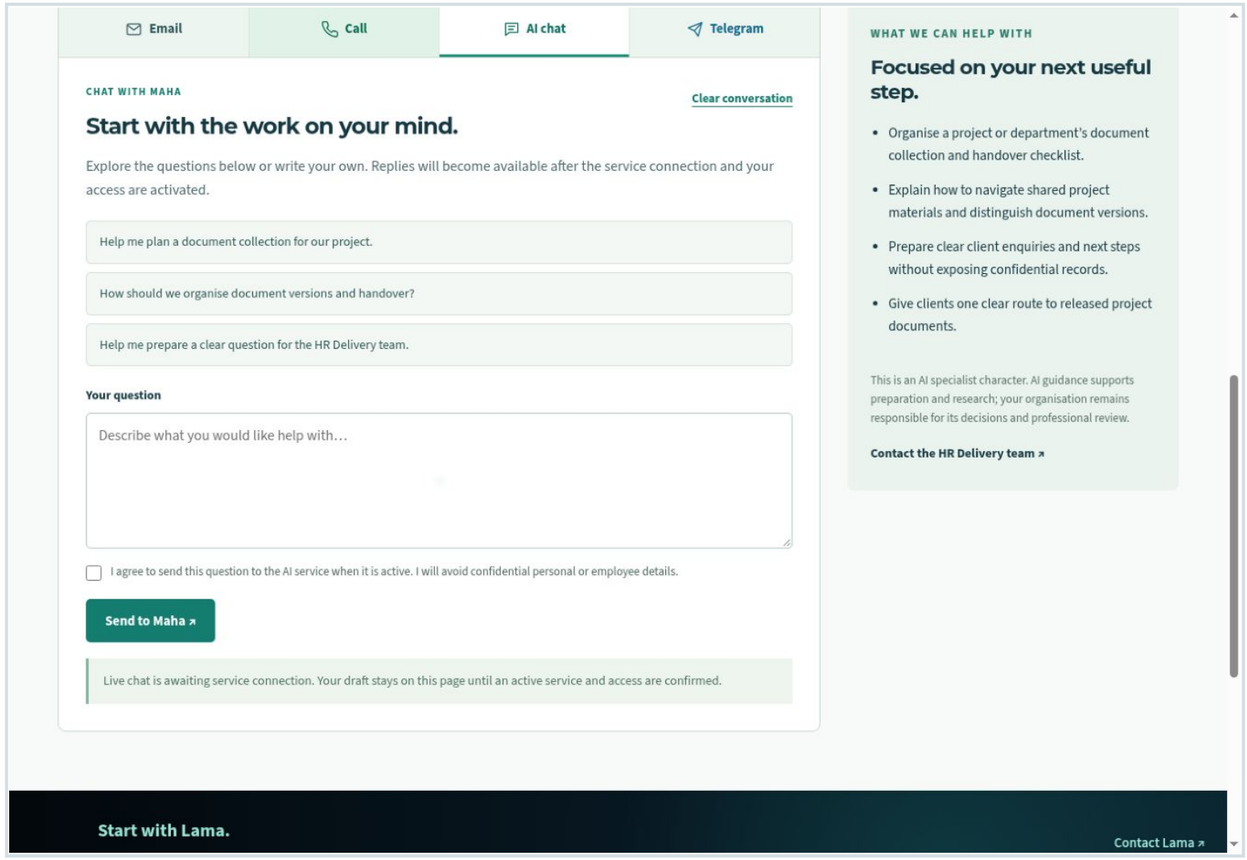
CHECK The question can be focused around a practical document task.

04 Prepare the question

Include the project, document title and edition where relevant, then state what is unclear. Use a safe summary rather than confidential employee records or collection credentials.

CHECK A concise, actionable support question is ready.

CURRENT LIVE SCREEN



Current communication panel shows prompts, the question field and the service-connection notice.

GET HELP AND REQUEST A DISCUSSION / STEPS 5–5 OF 5

OPEN SOURCE

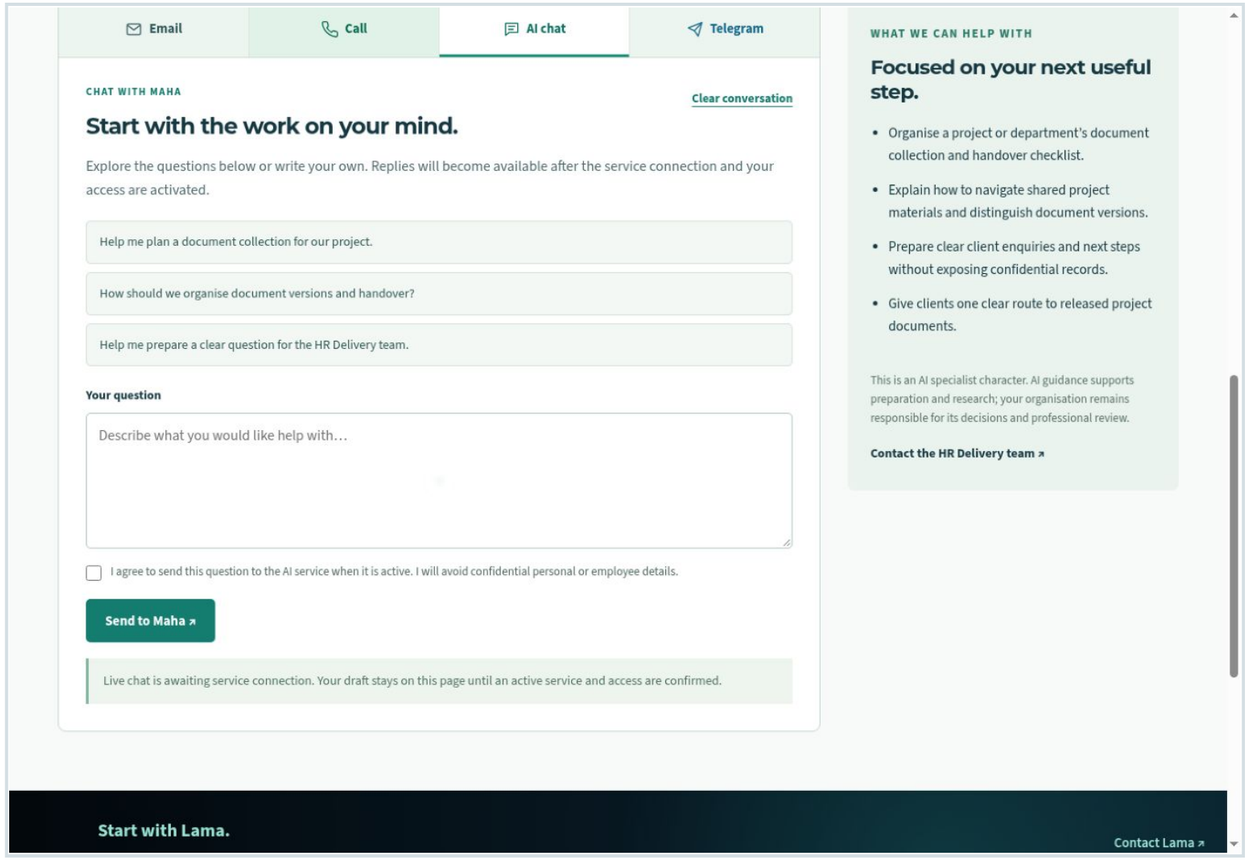
Use Maha’s document-support information

05 Read the connection notice before sending

The reviewed panel states that live chat awaits service connection and a draft stays on the page until service and access are confirmed. Use Contact the HR Delivery team for active human support.

CHECK You use a confirmed communication route rather than assuming a reply has been sent.

CURRENT LIVE SCREEN



Current communication panel shows prompts, the question field and the service-connection notice.

GET HELP AND REQUEST A DISCUSSION / L-02-02

OPEN SOURCE

Prepare an appointment request for Dr Phillip

Request a preferred discussion time with enough context for reception.

WHO USES THIS Client or prospective client

BEFORE YOU BEGIN

- Contact details
- Meeting purpose
- Preferred Qatar-time slot

WHAT YOU WILL HAVE

- Completed appointment-request draft

CHECK BEFORE YOU FINISH

- Correct Qatar date and time
- Telephone supplied for a call
- Purpose concise and relevant

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Form controls were inspected without entering personal information or submitting a request.

GET HELP AND REQUEST A DISCUSSION / STEPS 1–2 OF 6

OPEN SOURCE

Prepare an appointment request for Dr Phillip

01 Open 'Request an appointment'

Use Lama’s reception route. Read the notice that this is a request for a preferred time and requires staff confirmation.

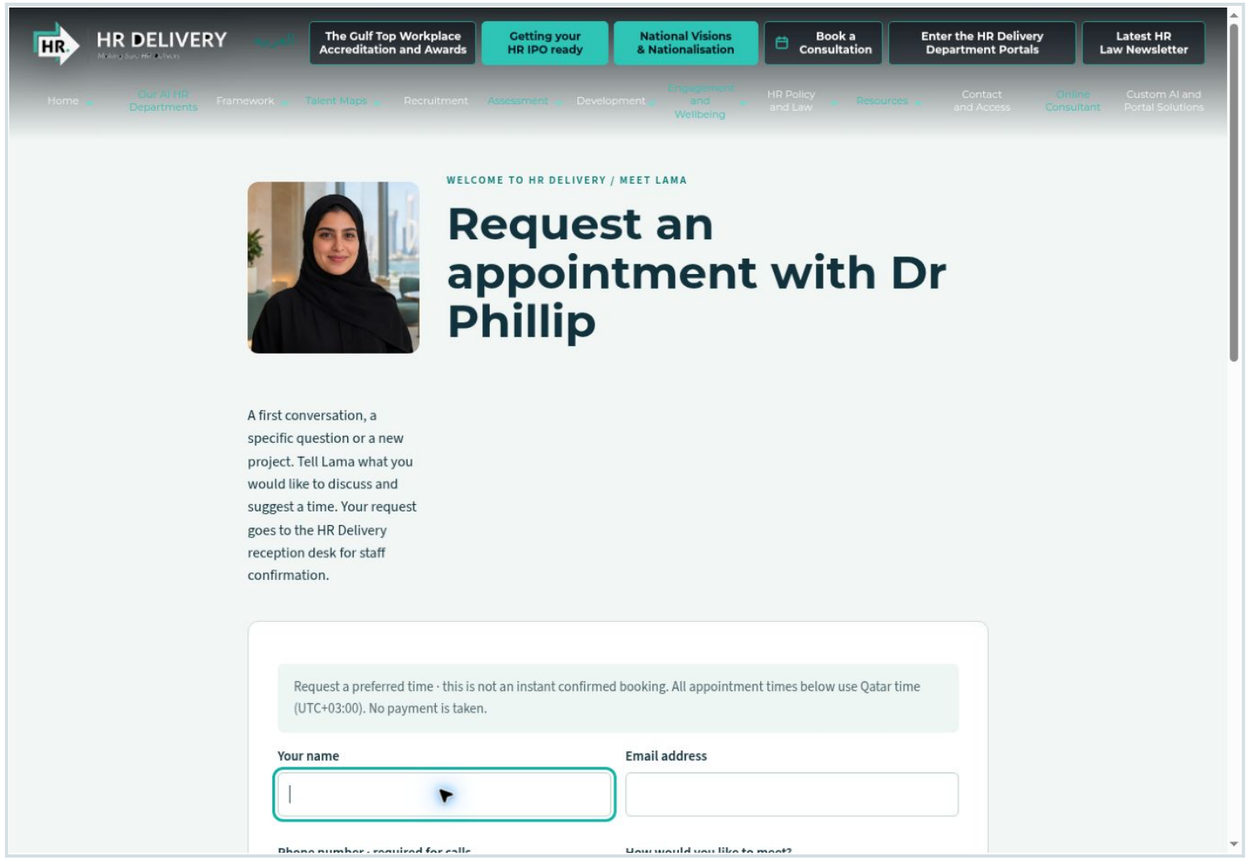
CHECK The appointment-request form is displayed.

02 Complete your contact details

Enter Your name and Email address. Provide the telephone number when requesting a call so reception can reach you.

CHECK The contact method is appropriate to the proposed meeting.

CURRENT LIVE SCREEN



Current appointment-request entry explains that staff confirmation is required.

GET HELP AND REQUEST A DISCUSSION / STEPS 3–4 OF 6

OPEN SOURCE

Prepare an appointment request for Dr Phillip

03 Choose 'How would you like to meet?'

Select Call / audio, Online meeting or In person. Choose the form of discussion that suits the purpose and participants.

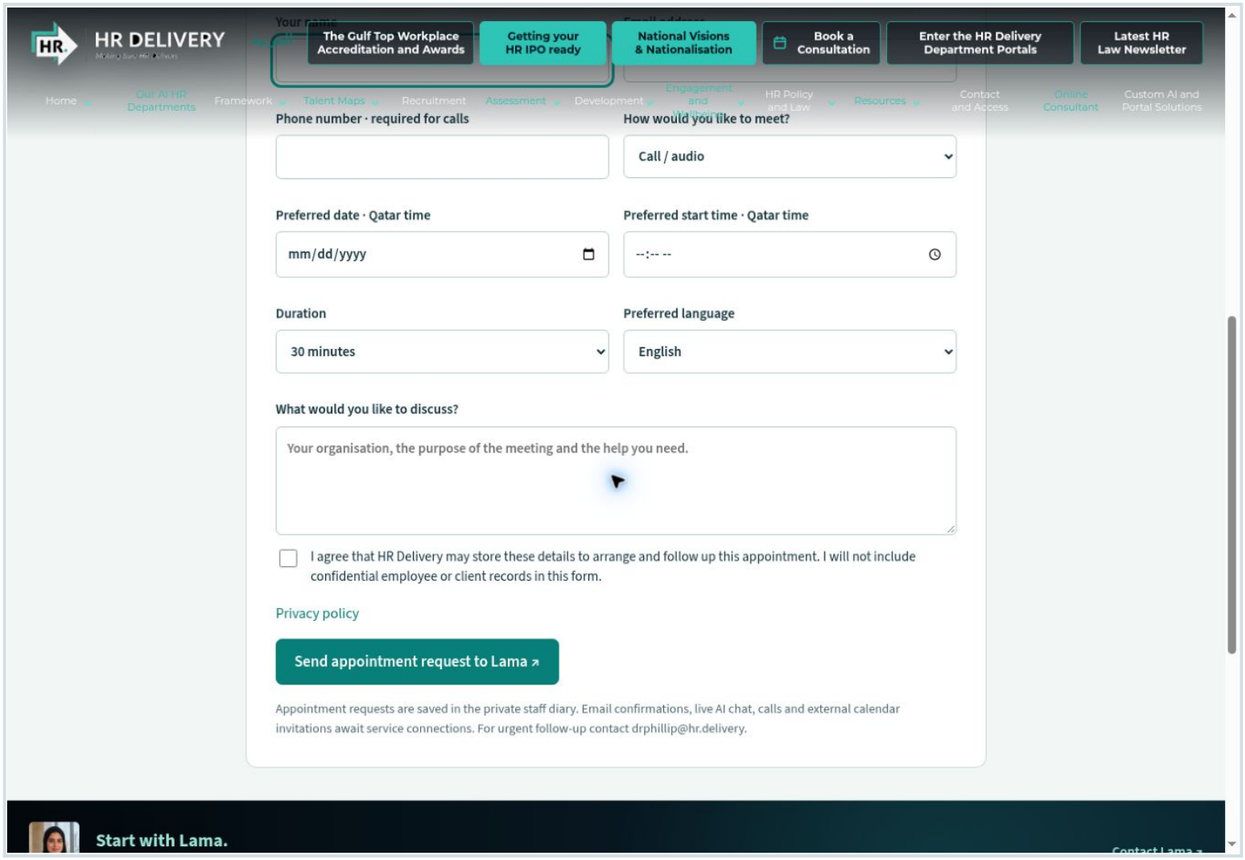
CHECK The preferred meeting mode is selected.

04 Set the date and start time

Use Preferred date and Preferred start time. The form labels all times as Qatar time, UTC+03:00; convert your own calendar before choosing.

CHECK The intended local meeting time is unambiguous.

CURRENT LIVE SCREEN



Current date, duration, language, purpose and consent controls. No appointment request was sent.

GET HELP AND REQUEST A DISCUSSION / STEPS 5–6 OF 6

OPEN SOURCE

Prepare an appointment request for Dr Phillip

05 Choose duration and language

Select 15, 30 or 60 minutes and English or Arabic. Use the time needed for a focused discussion.

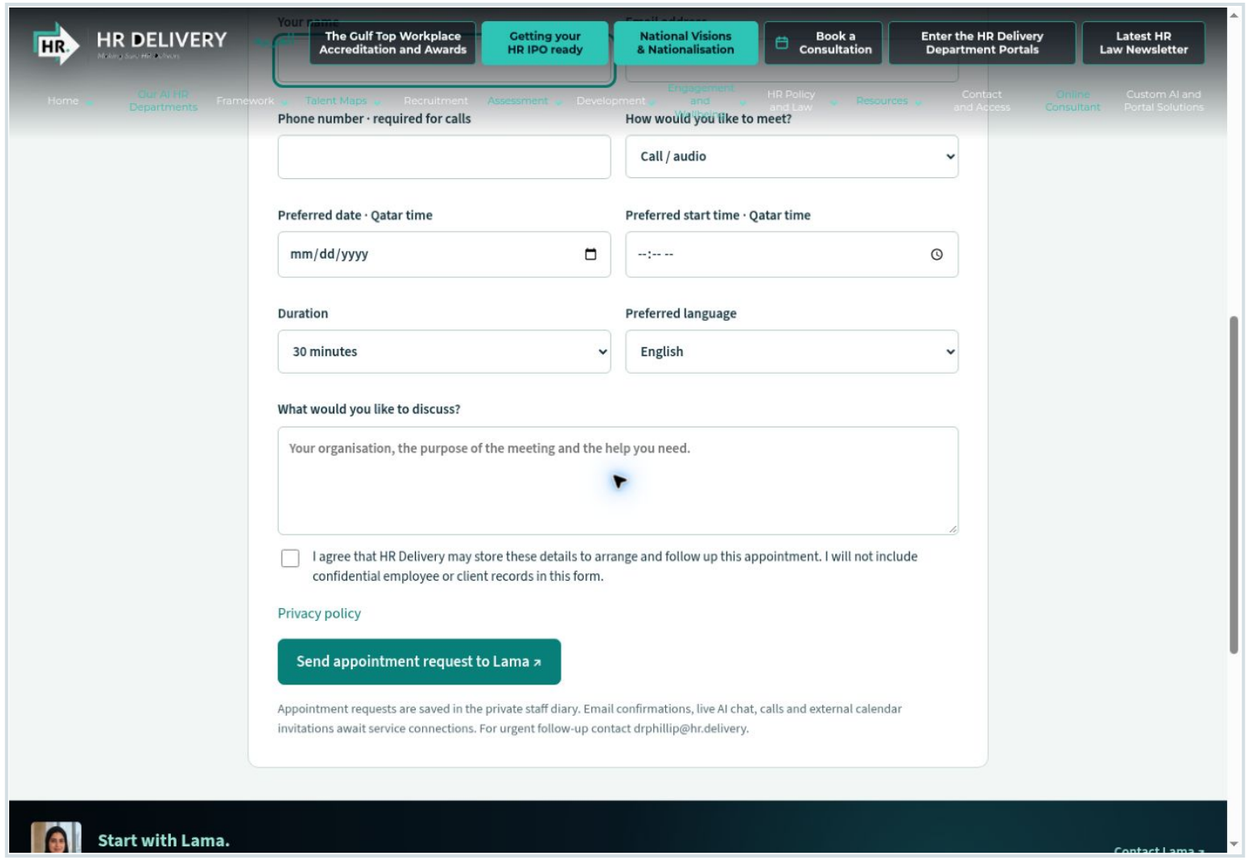
CHECK The request describes practical meeting arrangements.

06 Complete 'What would you like to discuss?'

State the project, decision or question and the outcome you want from the conversation. Do not put confidential employee material in the form.

CHECK Reception can route and prepare for the discussion.

CURRENT LIVE SCREEN



Current date, duration, language, purpose and consent controls. No appointment request was sent.

GET HELP AND REQUEST A DISCUSSION / L-02-03

OPEN SOURCE

Review the request and wait for confirmation

Understand what submission does and how to follow up appropriately.

WHO USES THIS Appointment requester

BEFORE YOU BEGIN

- Completed request draft
- Authority to provide the contact details

WHAT YOU WILL HAVE

- Submitted request when the user chooses to submit
- Confirmed arrangement after staff review

CHECK BEFORE YOU FINISH

- Form response checked
- Staff confirmation received before treating time as booked
- Changes communicated through the agreed route

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

No request was sent. The page states that automatic email, chat, calls and external-calendar delivery await service connections.

GET HELP AND REQUEST A DISCUSSION / STEPS 1–2 OF 5

OPEN SOURCE

Review the request and wait for confirmation

01 Review the complete request

Check spelling, contact details, date, start time, duration, language and meeting mode. A wrong timezone or address can delay arrangements.

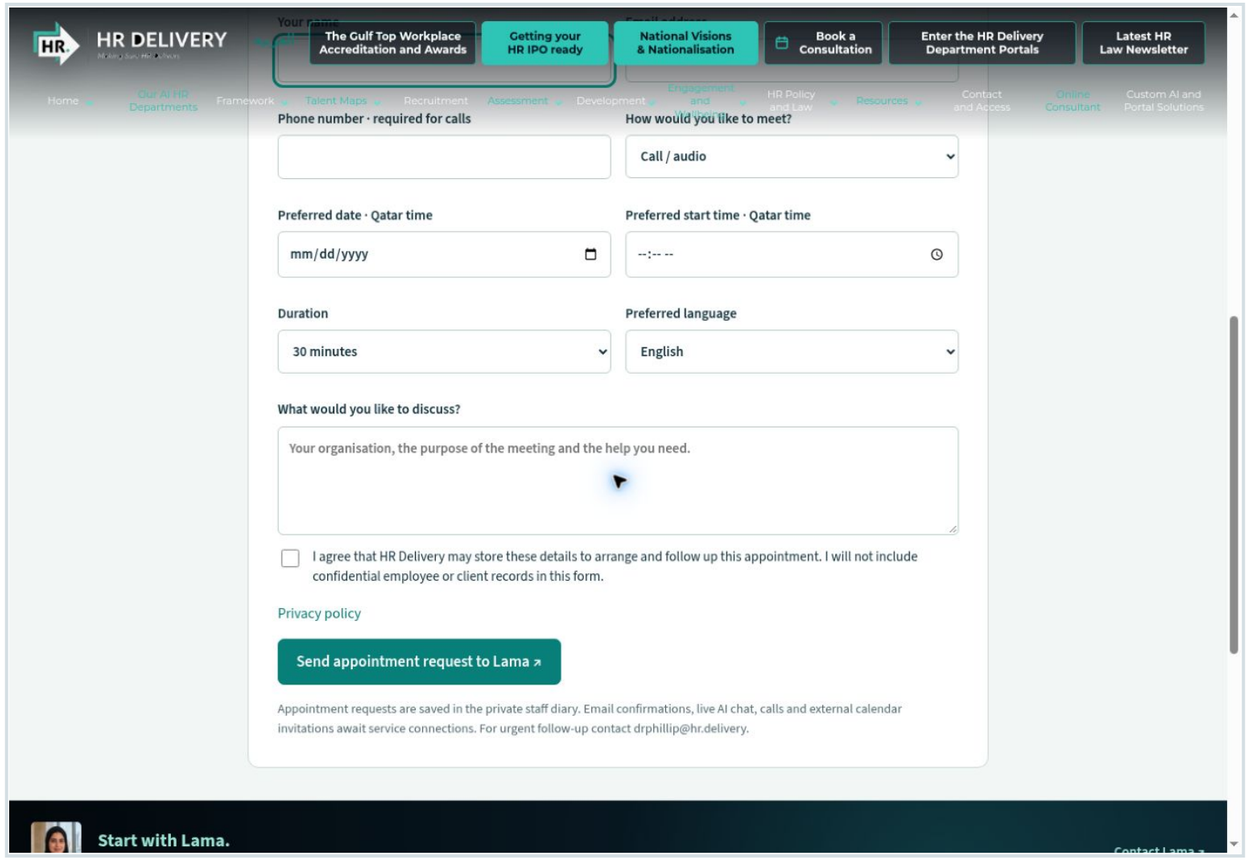
CHECK The information is accurate enough for reception to act on.

02 Read the privacy notice and consent

Review the stated use of the details for managing the appointment request. Use the Privacy policy link if you need the wider information.

CHECK You understand the purpose of the information being provided.

CURRENT LIVE SCREEN



Current date, duration, language, purpose and consent controls. No appointment request was sent.

GET HELP AND REQUEST A DISCUSSION / STEPS 3–4 OF 5

OPEN SOURCE

Review the request and wait for confirmation

03 Select 'Send appointment request to Lama ↗' when ready

Only submit your own intended request after completing the required declaration. This guide did not submit an appointment.

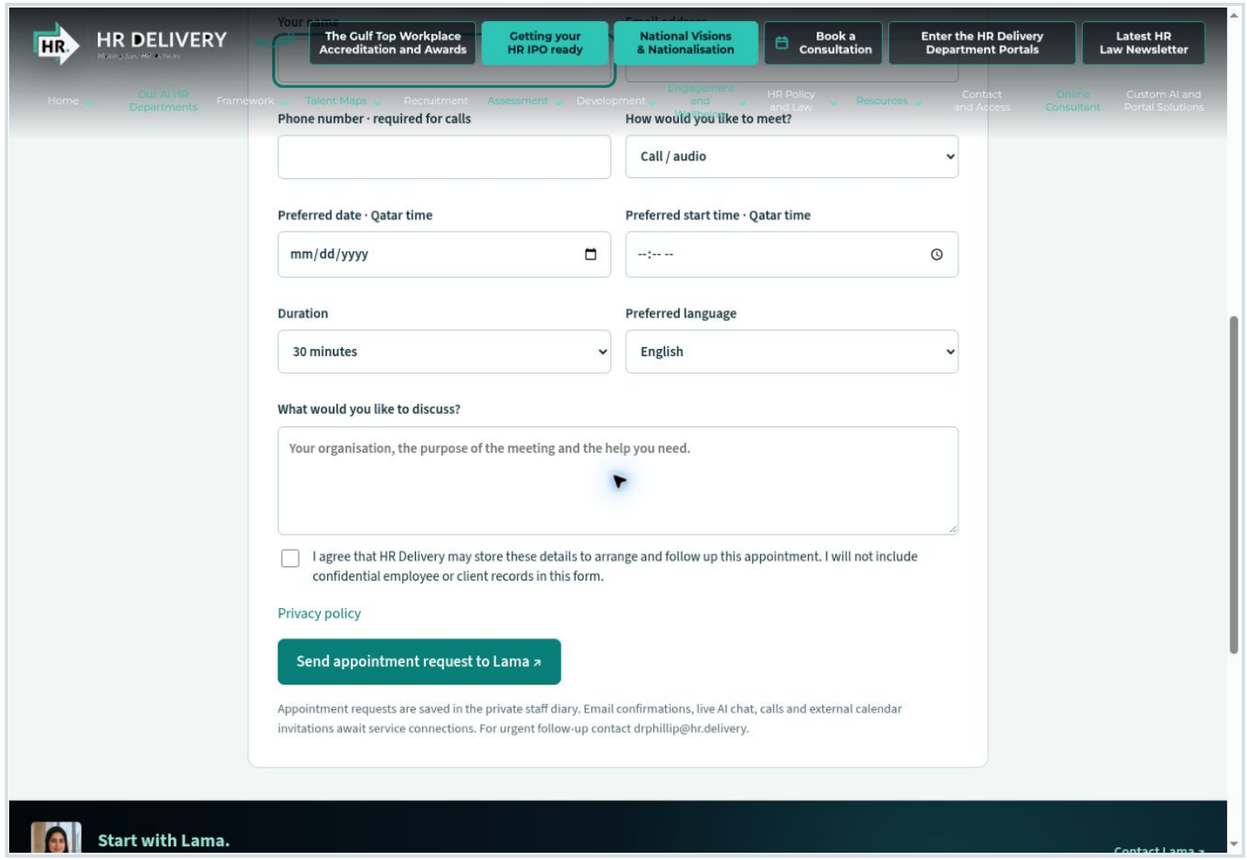
CHECK Checkpoint: read the response shown by the form and retain any reference or instructions.

04 Wait for staff confirmation

Treat the requested time as provisional until reception confirms it. The request is not an instant confirmed booking and no payment is taken by this form.

CHECK A requested slot is not confused with an agreed appointment.

CURRENT LIVE SCREEN



Current date, duration, language, purpose and consent controls. No appointment request was sent.

GET HELP AND REQUEST A DISCUSSION / STEPS 5–5 OF 5

OPEN SOURCE

Review the request and wait for confirmation

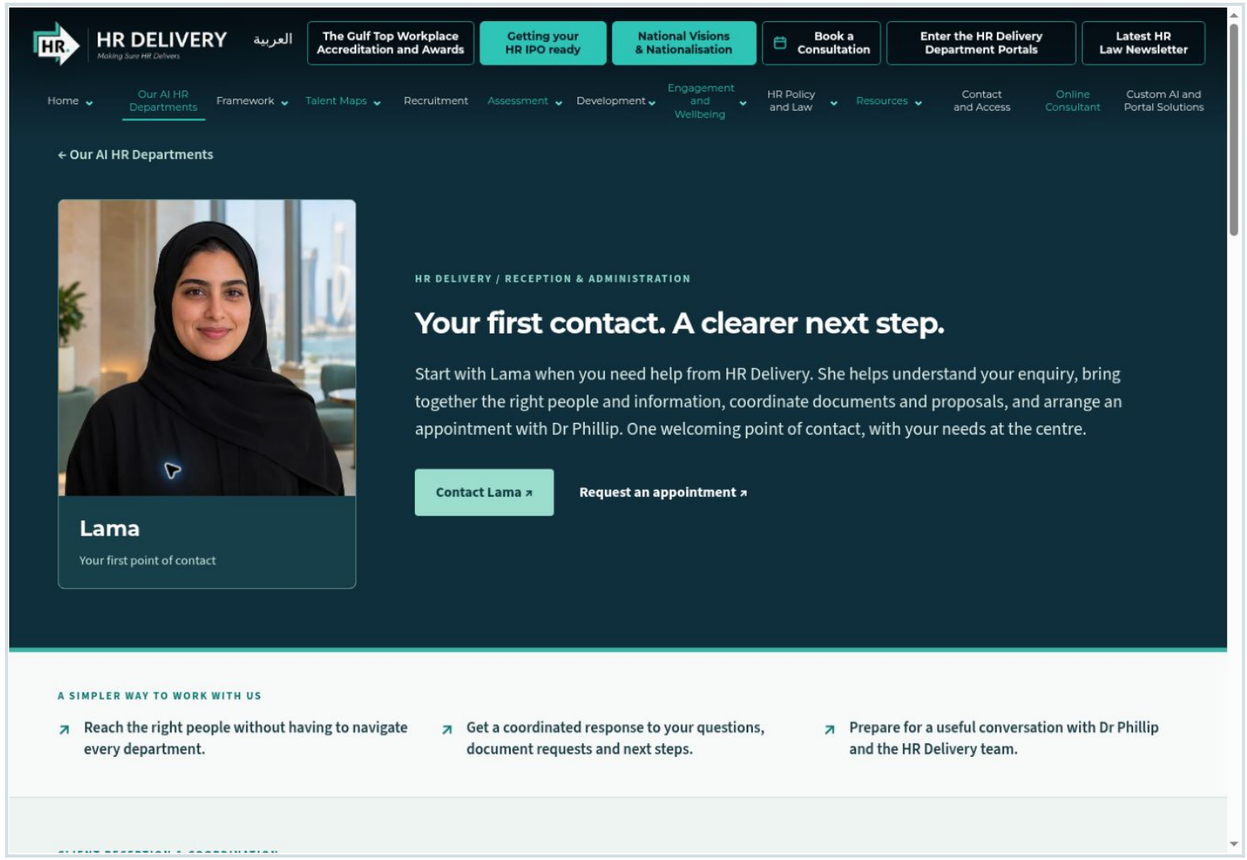
05

Use the agreed route for changes

If you need to amend or cancel, contact reception with the original name, date and time. Confirm the revised arrangement rather than assuming a calendar change was delivered.

CHECK The requester and reception share the same appointment status.

PRIOR REVIEWED SCREEN



Public reception and administration overview supporting the staff workflow context.

03 Authorised staff: prepare and release client documents

These workflows are for the HR Delivery delivery team, not client recipients.

06 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-01

OPEN SOURCE

Enter the Staff Document Portal

Use the appropriate staff account for preparation and release work.

WHO USES THIS Authorised HR Delivery staff

BEFORE YOU BEGIN

- Staff account issued for document administration
- Assigned client or project responsibility

WHAT YOU WILL HAVE

- Correct staff working context

CHECK BEFORE YOU FINISH

- Authorised staff account used
- Client and project checked
- Client access is not treated as administration

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Only the staff sign-in screen was entered. The private library and its permissions were not tested.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 5

OPEN SOURCE

Enter the Staff Document Portal

01 Open the Staff Document Portal

Use the staff link supplied by HR Delivery. Confirm the heading Private document administration.

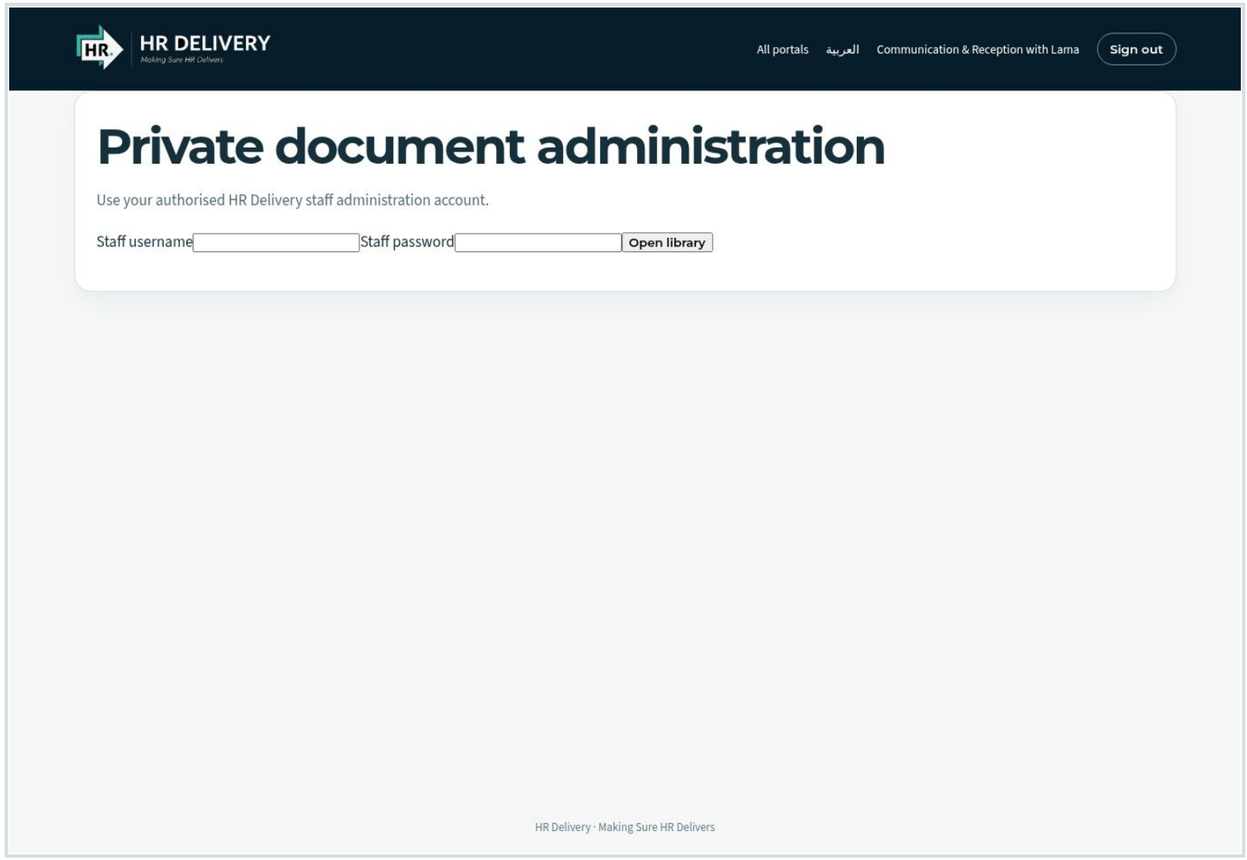
CHECK The staff sign-in form appears.

02 Complete 'Staff username' and 'Staff password'

Use the authorised staff account. Client collection references and specialist-service codes do not grant document administration.

CHECK The account is entered in the staff fields without exposing credentials.

CURRENT LIVE SCREEN



Current Staff Document Portal entry. Private document administration requires an authorised staff account.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 5

OPEN SOURCE

Enter the Staff Document Portal

03 Select 'Open library'

Continue through the authorised sign-in process and check the account's permitted document functions.

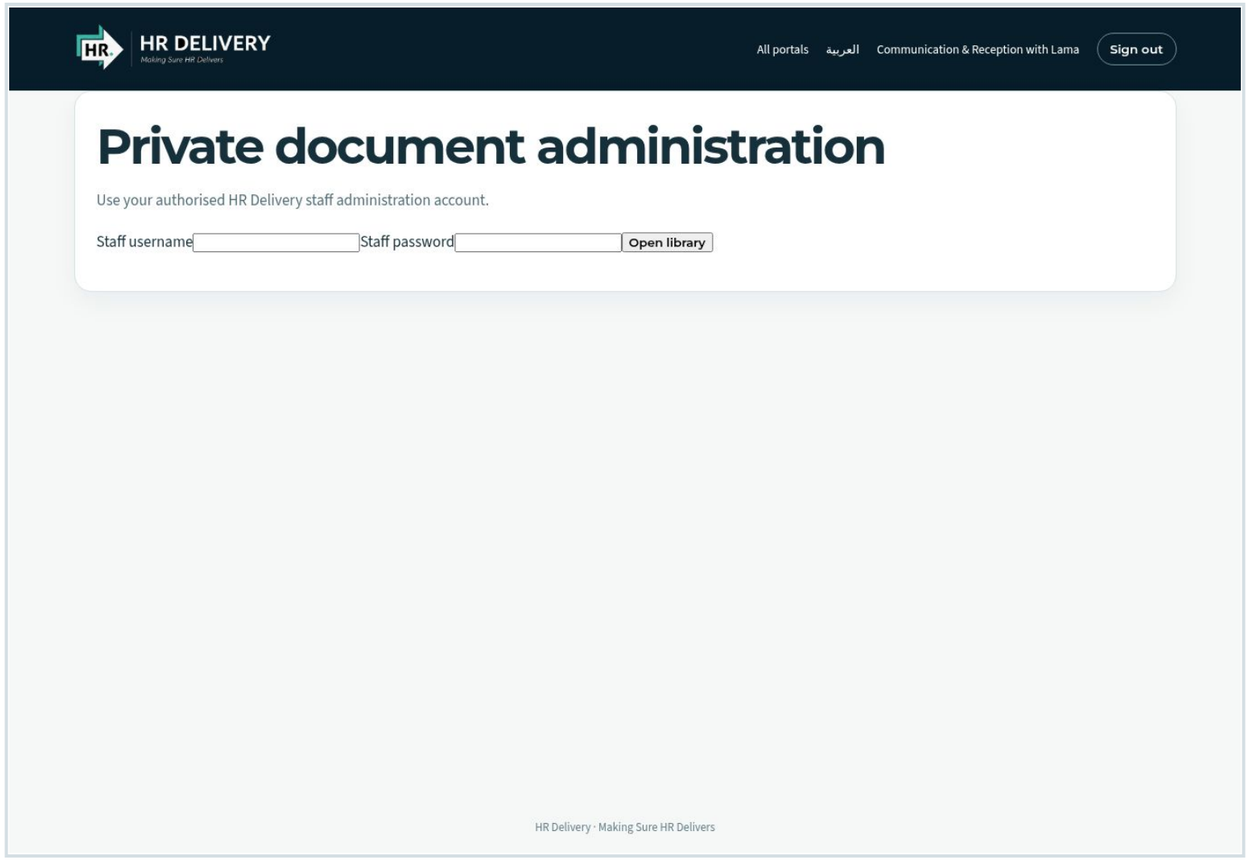
CHECK Checkpoint: the staff workspace should open if the account is accepted.

04 Confirm the work context

Identify the relevant client, contact and project before selecting a template or opening any private material.

CHECK The document has a clear client and project home.

CURRENT LIVE SCREEN



Current Staff Document Portal entry. Private document administration requires an authorised staff account.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–5 OF 5

OPEN SOURCE

Enter the Staff Document Portal

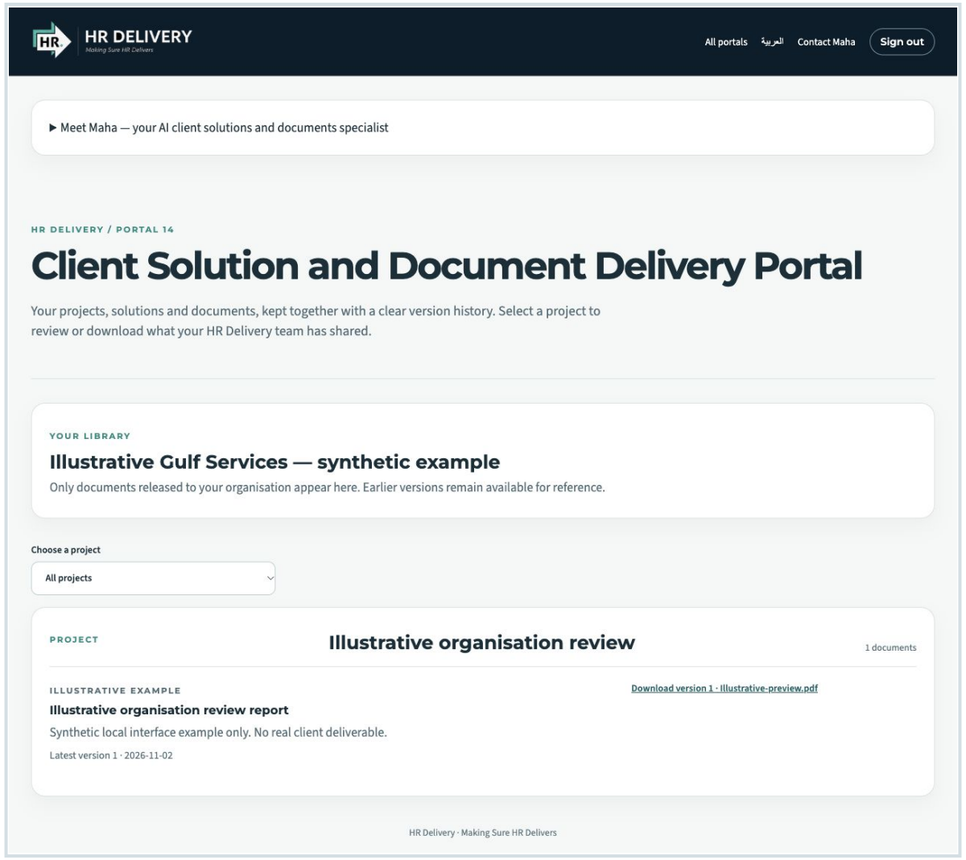
05

Keep administration and client use separate

Prepare, review and release through the staff workflow. Use the client collection to understand what has been made available to the intended recipient.

CHECK The preparation record and released collection remain distinct.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-02

OPEN SOURCE

Prepare a document from an approved template

Create a client-specific working document with an appropriate structure.

WHO USES THIS Authorised document preparer

BEFORE YOU BEGIN

- Assignment brief
- Client and project record
- Required output format

WHAT YOU WILL HAVE

- Project-linked working document
- Review edition with a clear owner

CHECK BEFORE YOU FINISH

- Approved starting format
- Correct project association
- Examples and placeholders resolved

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private document authoring or version saving was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Prepare a document from an approved template

01 Confirm the intended deliverable

Identify the audience, purpose, required decisions and format before choosing a template. Check the agreed scope and document owner.

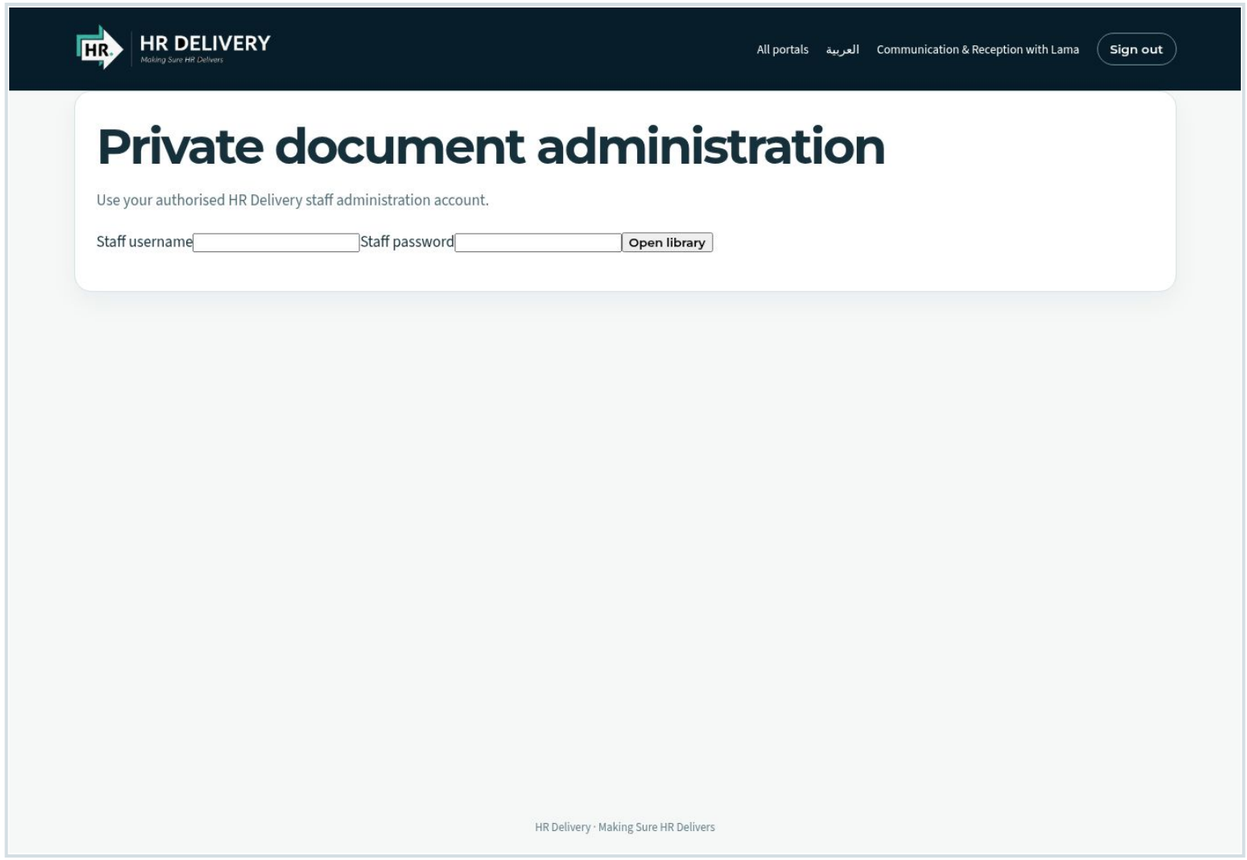
CHECK The deliverable’s role in the assignment is clear.

02 Open the approved template library

Use the relevant approved starting format for slides, Word documents, spreadsheets, letters or proposals described for the staff portal.

CHECK Checkpoint: the starting format matches the deliverable.

CURRENT LIVE SCREEN



Staff entry screen for context; the private preparation, version and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Prepare a document from an approved template

03 Continue in Document Studio

Create the working material within the assigned client and project context. Use the controls displayed in the authorised account to name and organise the document.

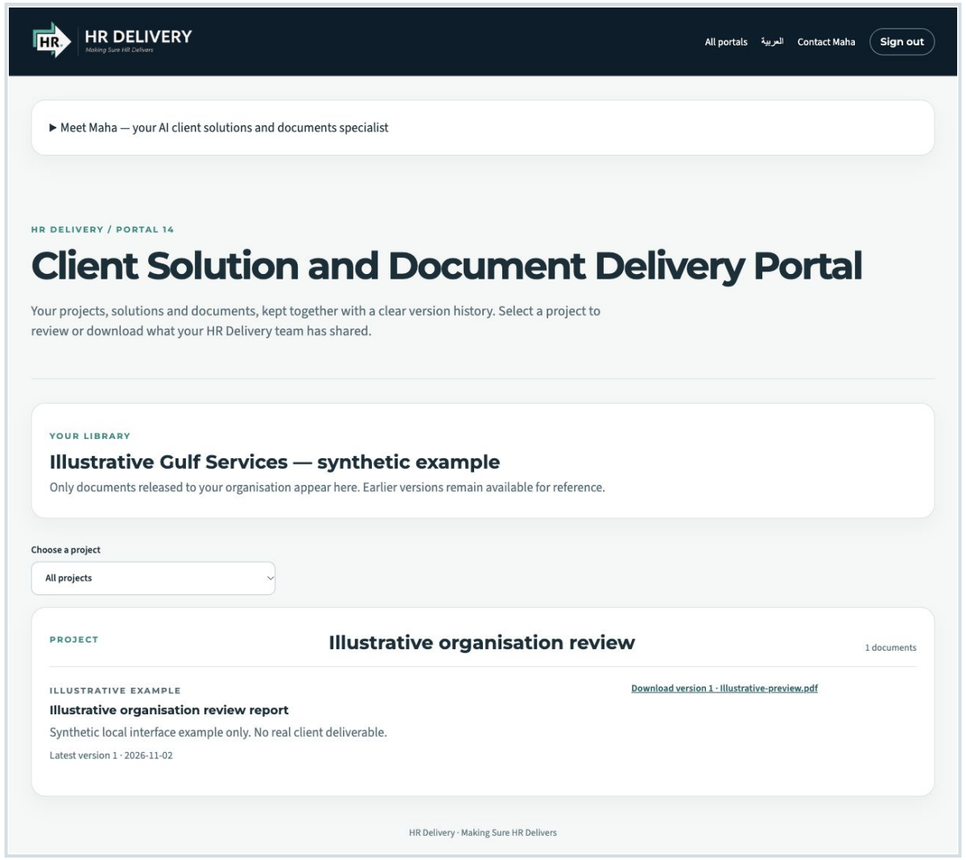
CHECK Checkpoint: the working document is associated with the correct assignment.

04 Develop the client-specific content

Complete the facts, analysis, recommendations, instructions and appendices needed for the brief. Remove example material and unresolved placeholders.

CHECK Checkpoint: the content is usable for this client rather than a generic template.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Prepare a document from an approved template

05 Prepare the review edition

Check accuracy, presentation, links, tables and any calculations. Identify the version and the reviewer responsible for approving it.

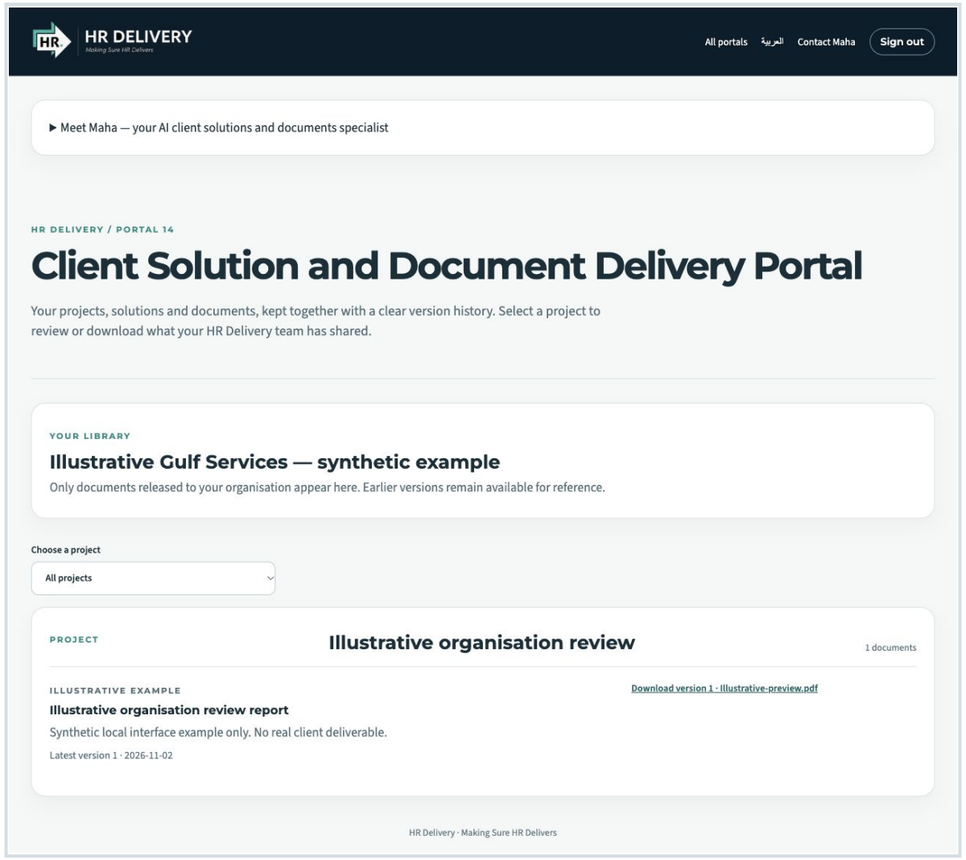
CHECK Checkpoint: a complete working edition is ready for review.

06 Retain the working history

Use the supported version workflow before preparing a later revision. Release into the client collection is a separate decision.

CHECK Checkpoint: the review edition can be traced and distinguished from later work.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-03

OPEN SOURCE

Maintain client, contact and project records

Keep the relationship between the client, people and deliverable clear.

WHO USES THIS Authorised delivery coordinator

BEFORE YOU BEGIN

- Confirmed organisation and contact details
- Assignment reference
- Authority to maintain the record

WHAT YOU WILL HAVE

- Maintained client and project context

CHECK BEFORE YOU FINISH

- Existing record checked before duplication
- Contact roles explicit
- Documents linked to the correct assignment

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private client, contact or project record changes was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 5

OPEN SOURCE

Maintain client, contact and project records

01 Locate the correct client

Check the legal or agreed organisation name and any existing record before creating another entry. Avoid duplicating a client because the trading name differs.

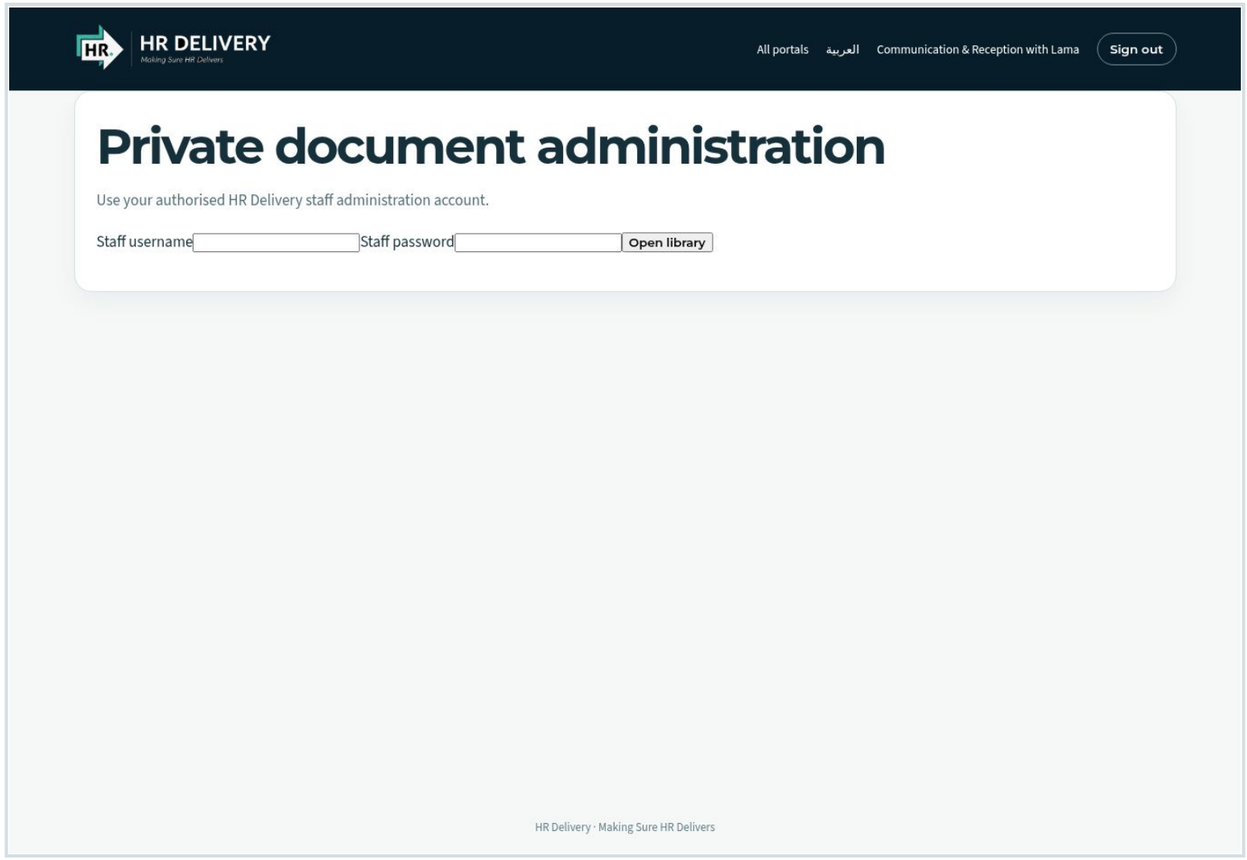
CHECK Checkpoint: the intended organisation record is identified.

02 Confirm relevant contacts

Keep the sponsor, day-to-day contact and delivery recipient distinct where they are different people. Record only information needed for the assignment.

CHECK Checkpoint: the people and their roles are clear.

CURRENT LIVE SCREEN



Staff entry screen for context; the private preparation, version and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 5

OPEN SOURCE

Maintain client, contact and project records

03 Identify the project

Use the agreed assignment title and reference. Keep separate projects distinct when the same client has several concurrent services.

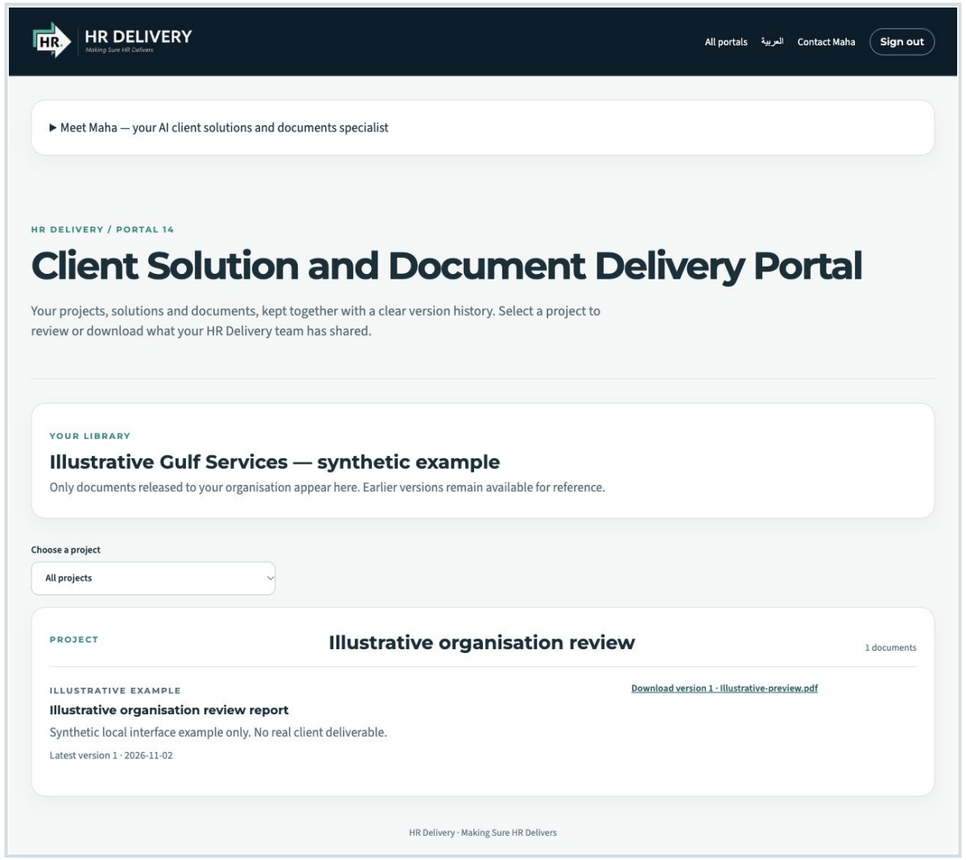
CHECK Checkpoint: each deliverable has an unambiguous project association.

04 Check document relationships

Review which working documents and released editions belong to the project. Resolve misplaced files before a client handover.

CHECK Checkpoint: the project collection is coherent.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–5 OF 5

OPEN SOURCE

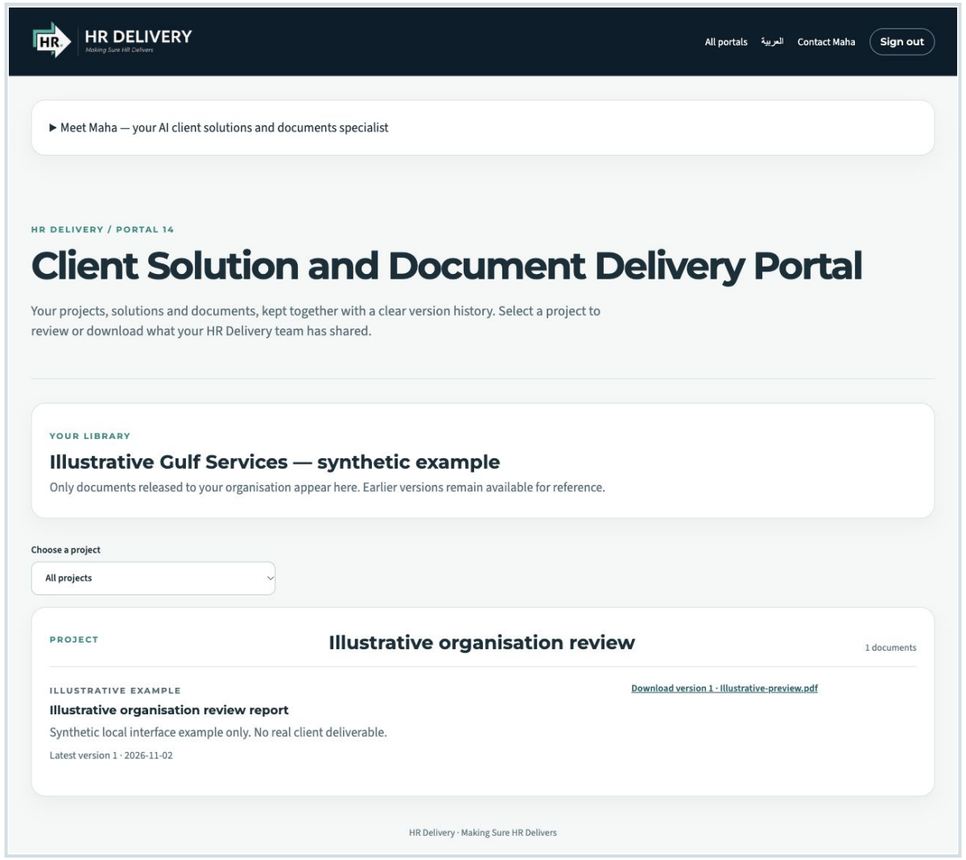
Maintain client, contact and project records

05 Review changes before retaining them

Check that a contact or project change does not alter an agreed recipient or release responsibility without the appropriate authority.

CHECK Checkpoint: the record supports the intended delivery and review arrangement.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-04

OPEN SOURCE

Store private working files and maintain versions

Retain preparation material without confusing it with a released deliverable.

WHO USES THIS Authorised document preparer

BEFORE YOU BEGIN

- Appropriate file and storage authority
- Correct project
- Document name and version

WHAT YOU WILL HAVE

- Private project working-file collection
- Traceable document editions

CHECK BEFORE YOU FINISH

- Right client and project
- Uploaded file opens completely
- Release status checked separately

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private uploads, storage or retained-version changes was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Store private working files and maintain versions

01 Check the file before upload

Confirm the file belongs to the assignment, is needed for the work and can be stored in the agreed workspace. Remove accidental attachments and unnecessary personal information.

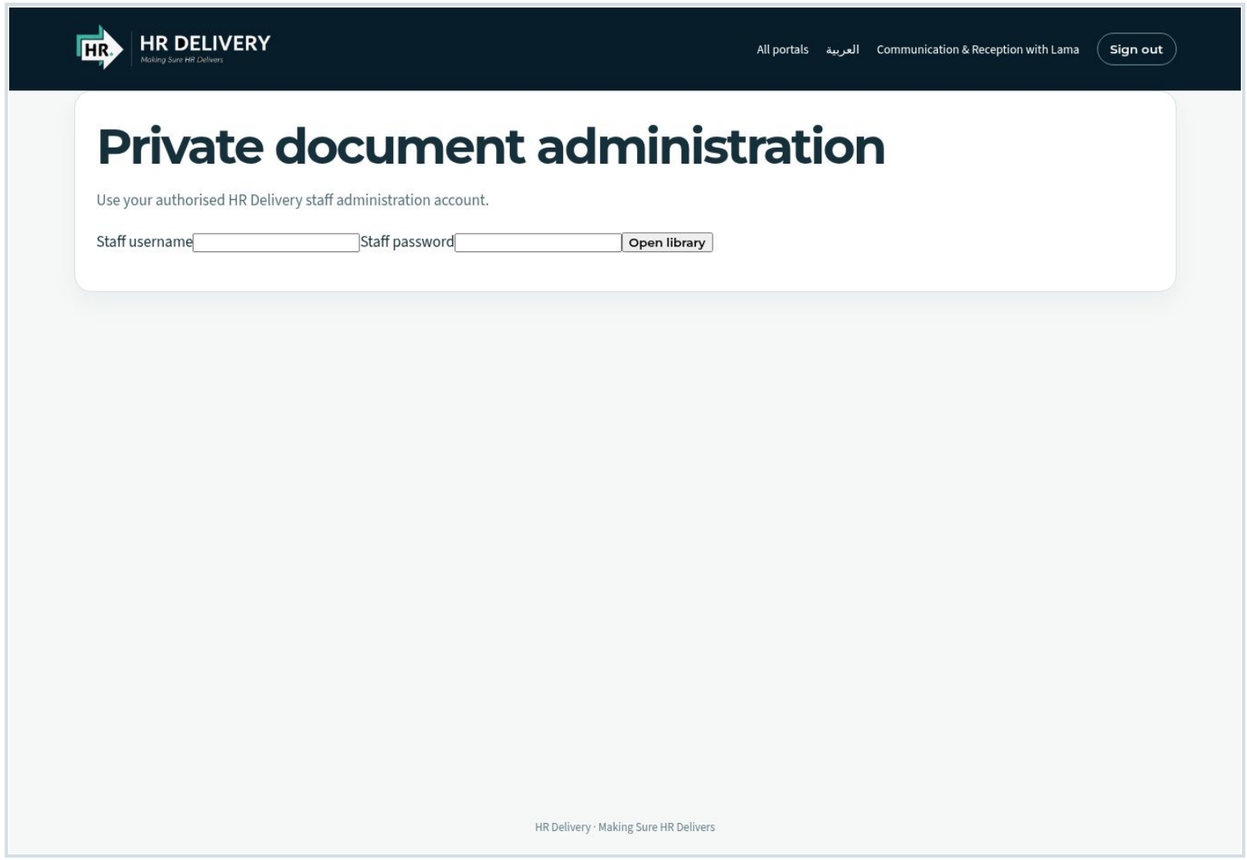
CHECK The file is suitable for the intended working record.

02 Select the client and project

Use the authorised staff storage area associated with the assignment. Confirm the destination before selecting the file.

CHECK Checkpoint: the upload belongs to the correct preparation context.

CURRENT LIVE SCREEN



Staff entry screen for context; the private preparation, version and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Store private working files and maintain versions

03 Use the supported private upload

Follow the actual file-selection and upload controls in the authorised account. Keep the title, category and version clear.

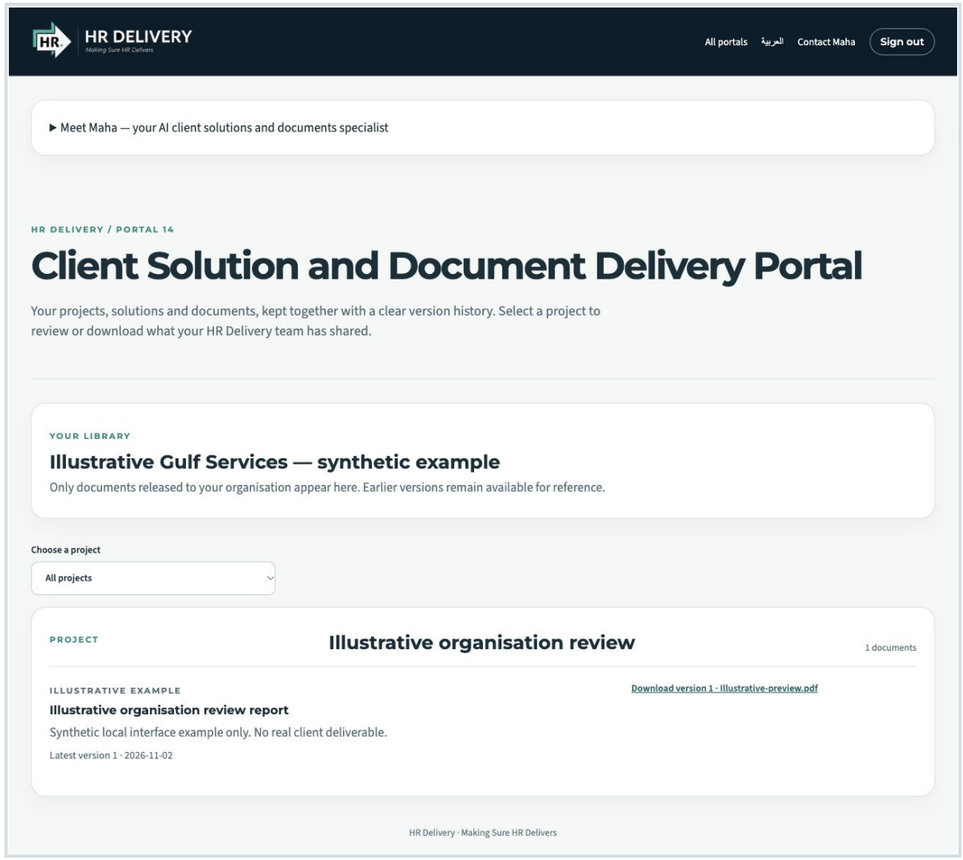
CHECK Checkpoint: the uploaded file appears in the intended staff working collection.

04 Open and check the retained file

Confirm the full file is readable and the version matches the uploaded edition. Check worksheets, appendices or embedded resources where relevant.

CHECK Checkpoint: the retained material is complete and usable.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Store private working files and maintain versions

05 Retain revisions through version history

Use the supported version process when replacing or revising material. Keep a concise description of the change and review status where the workspace supports it.

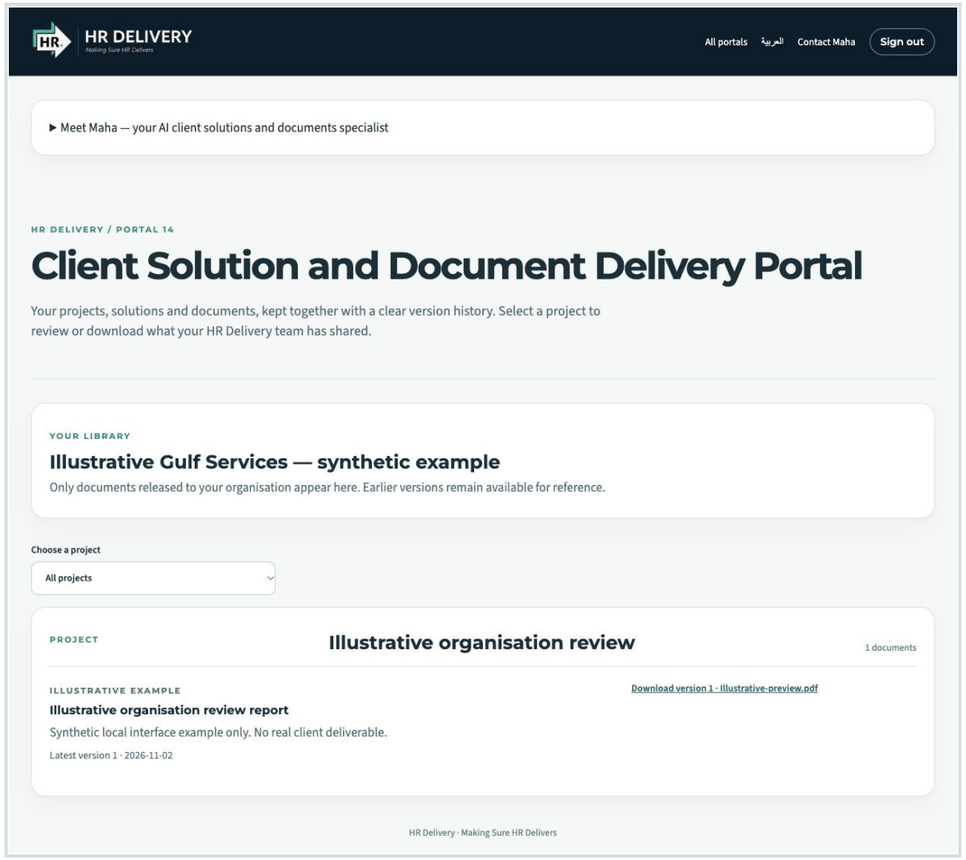
CHECK Checkpoint: the latest working edition and earlier history are distinguishable.

06 Keep release as a separate step

An internal file is not automatically a client deliverable. Complete review and the explicit release workflow before telling the client it is available.

CHECK Checkpoint: private preparation and client availability are not confused.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-05

OPEN SOURCE

Release or hide a client deliverable

Make the reviewed edition available to the intended client collection.

WHO USES THIS Authorised release owner

BEFORE YOU BEGIN

- Reviewed document
- Release authority
- Correct client collection and project

WHAT YOU WILL HAVE

- Released, identifiable client deliverable
- Controlled visibility record

CHECK BEFORE YOU FINISH

- Approved edition selected
- Correct client destination
- Client-facing visibility checked
- Handover is explicit

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private release, hiding or client visibility changes was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Release or hide a client deliverable

01 Confirm the review outcome

Identify the exact file and version approved for client use. Resolve outstanding comments, placeholders and contradictory files before release.

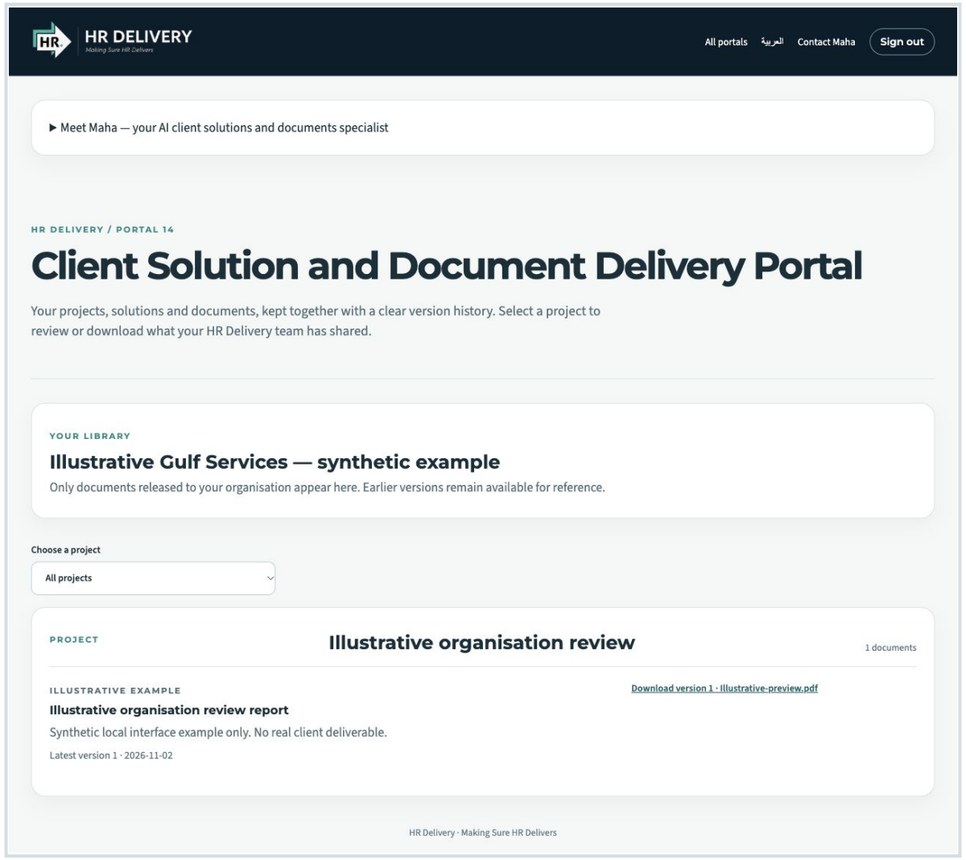
CHECK The intended issue edition is explicit.

02 Check the recipient and destination

Confirm the client reference, project and intended collection. Do not assume that a similarly named project has the same recipients.

CHECK Checkpoint: the release destination is correct.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Release or hide a client deliverable

03 Use the supported release control

Follow the authorised staff portal's release workflow for that document and edition. Private working material should remain outside the client collection unless deliberately approved.

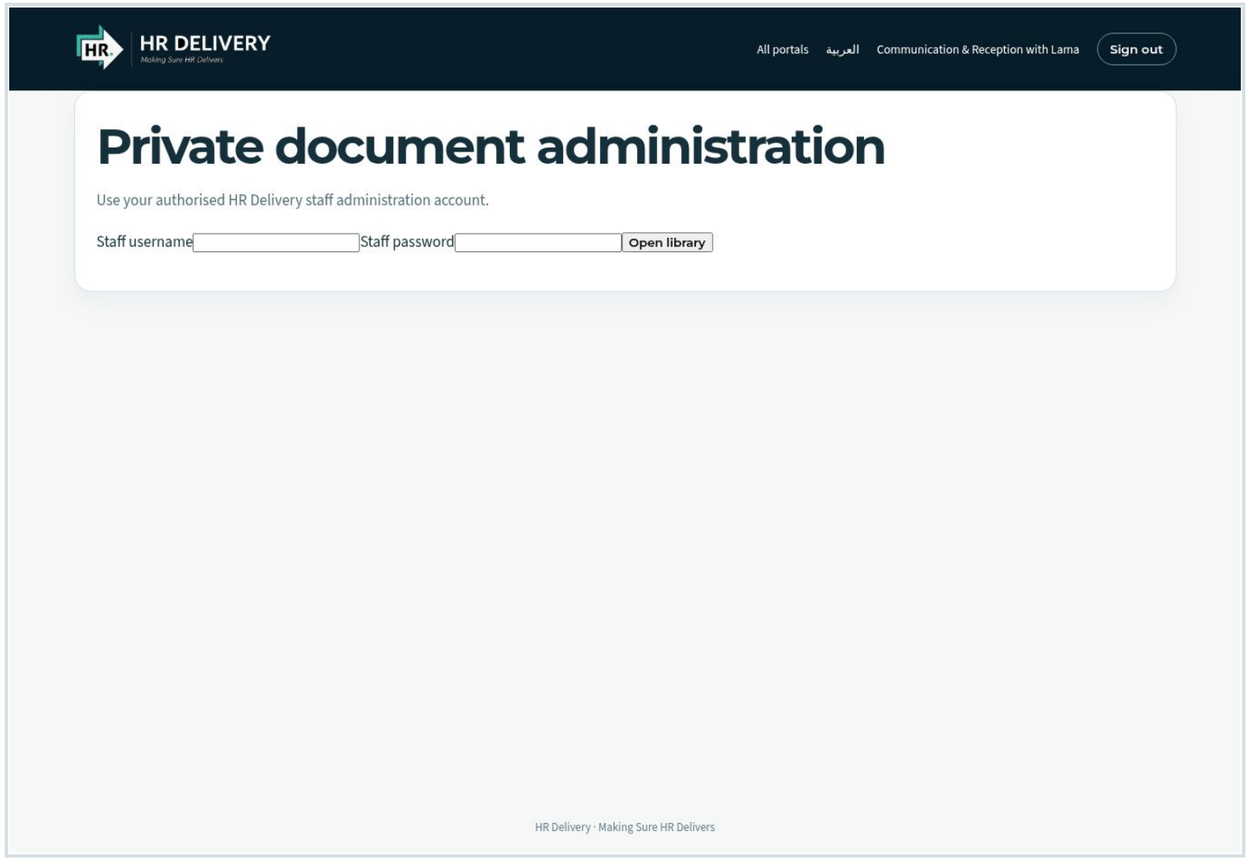
CHECK Checkpoint: the selected edition is marked for client visibility.

04 Verify the client-facing collection

Check the project, title, category, notes, latest version and download entry visible to the client through the authorised verification route.

CHECK Checkpoint: the released material is clearly identifiable and usable.

CURRENT LIVE SCREEN



Staff entry screen for context; the private preparation, version and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Release or hide a client deliverable

05 Prepare the handover

State the document, version, purpose, next action and support contact. Use the agreed delivery channel; release itself should not be assumed to send a message.

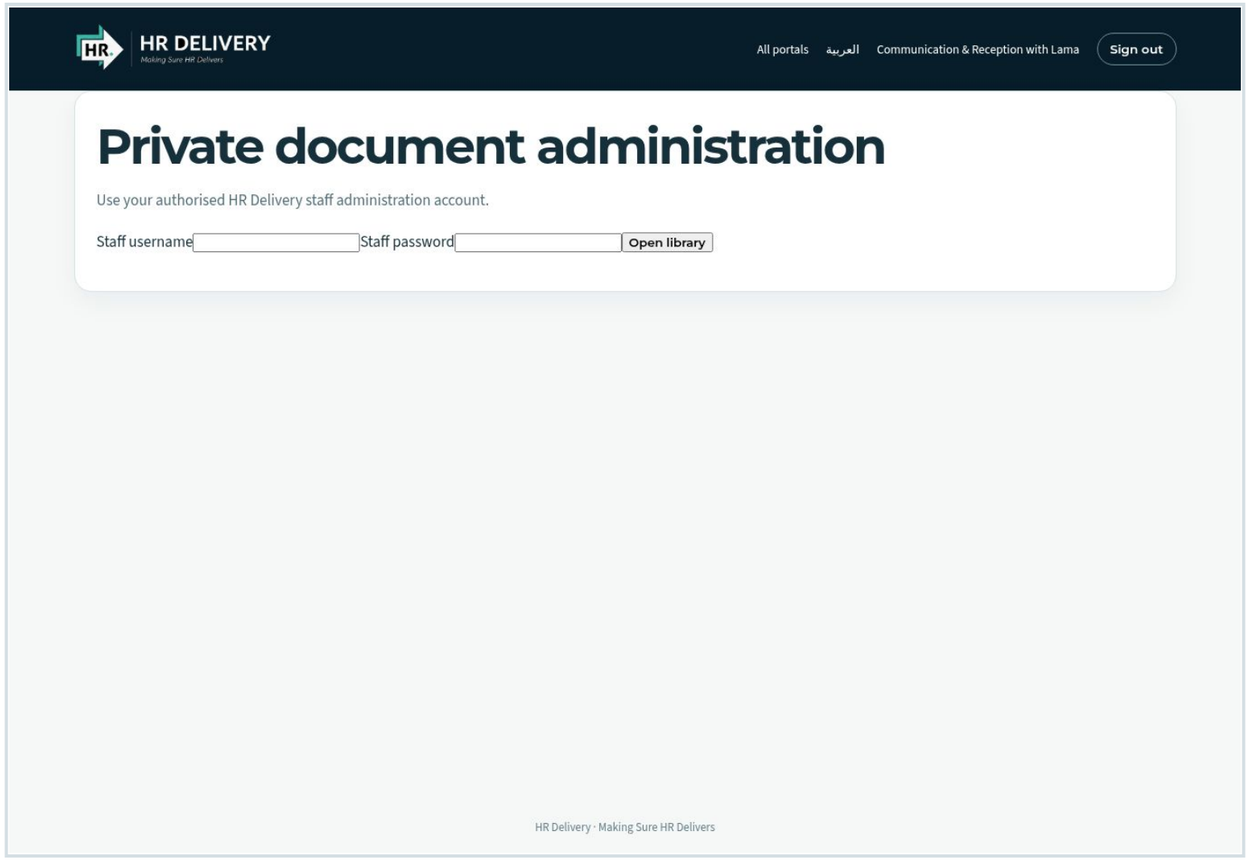
CHECK The client receives enough context to use the material.

06 Manage a later visibility change carefully

If authorised to hide a deliverable, identify the exact edition and reason, use the supported control and verify the resulting visibility. Coordinate any replacement and client explanation.

CHECK Checkpoint: the collection reflects the intended release state.

CURRENT LIVE SCREEN



Staff entry screen for context; the private preparation, version and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / L-03-06

OPEN SOURCE

Manage client references and access-code changes

Maintain the issued collection access through the agreed authority and handover.

WHO USES THIS Authorised client-access administrator

BEFORE YOU BEGIN

- Verified client and authorised recipient
- Authority for access administration
- Agreed secure handover route

WHAT YOU WILL HAVE

- Controlled collection-access handover

CHECK BEFORE YOU FINISH

- Recipient and scope verified
- Separate access types maintained
- No credentials exposed in routine records

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private reference or access-code administration was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 1–2 OF 5

OPEN SOURCE

Manage client references and access-code changes

01 Confirm the collection and recipient

Check the exact client reference and who is authorised to receive access. A document project can have a narrower audience than the whole client organisation.

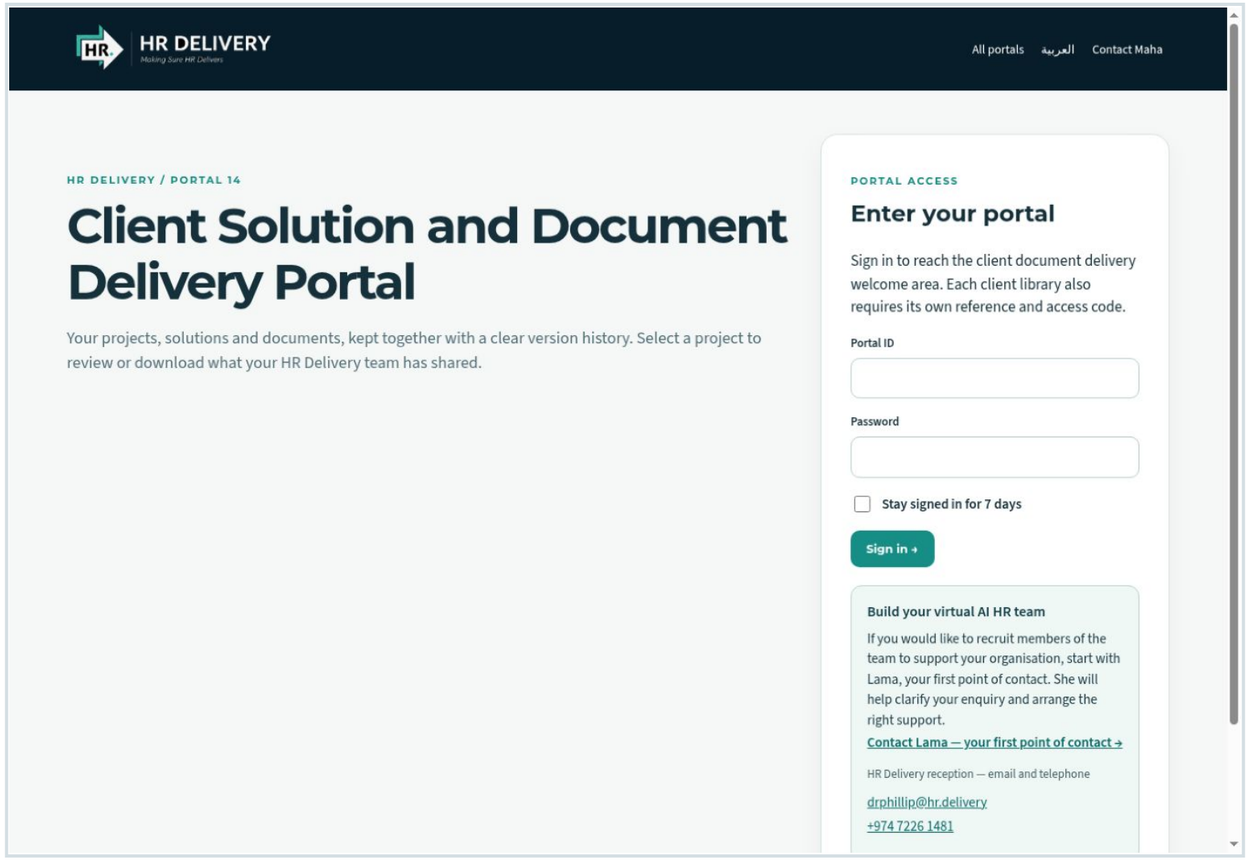
CHECK The intended access scope is explicit.

02 Review the current access arrangement

Identify whether this is a new handover, a lost-access question or a code rotation. Keep specialist-service codes and staff accounts separate.

CHECK The required administrative action is clear.

CURRENT LIVE SCREEN



Current client portal sign-in. The welcome sign-in is separate from each private client collection.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 3–4 OF 5

OPEN SOURCE

Manage client references and access-code changes

03 Use the supported access administration

Follow the actual authorised control for issuing or rotating the collection code. Do not place a code in an ordinary document title, note or screenshot.

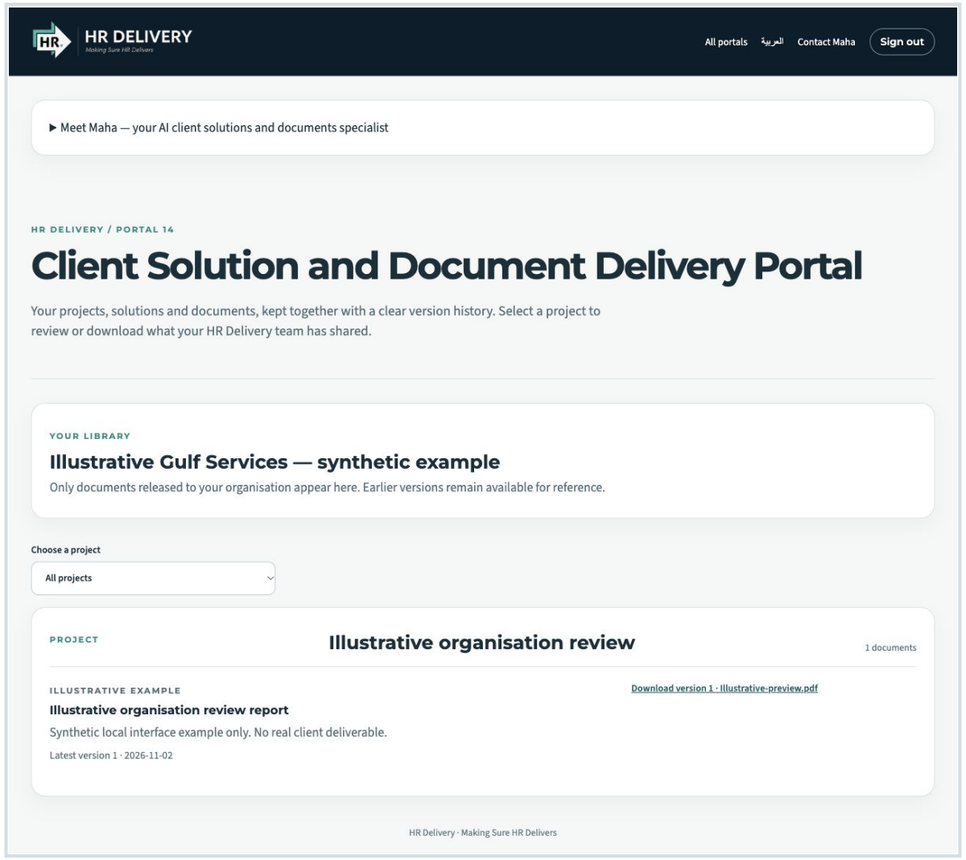
CHECK Checkpoint: the intended collection has the current authorised access arrangement.

04 Deliver the details through the agreed route

Provide the portal link, client reference and access instructions to the verified recipient using the agreed channel. Explain any change from the earlier handover.

CHECK Checkpoint: the correct recipient receives a clear access handover.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: PREPARE AND RELEASE CLIENT DOCUMENTS / STEPS 5–5 OF 5

OPEN SOURCE

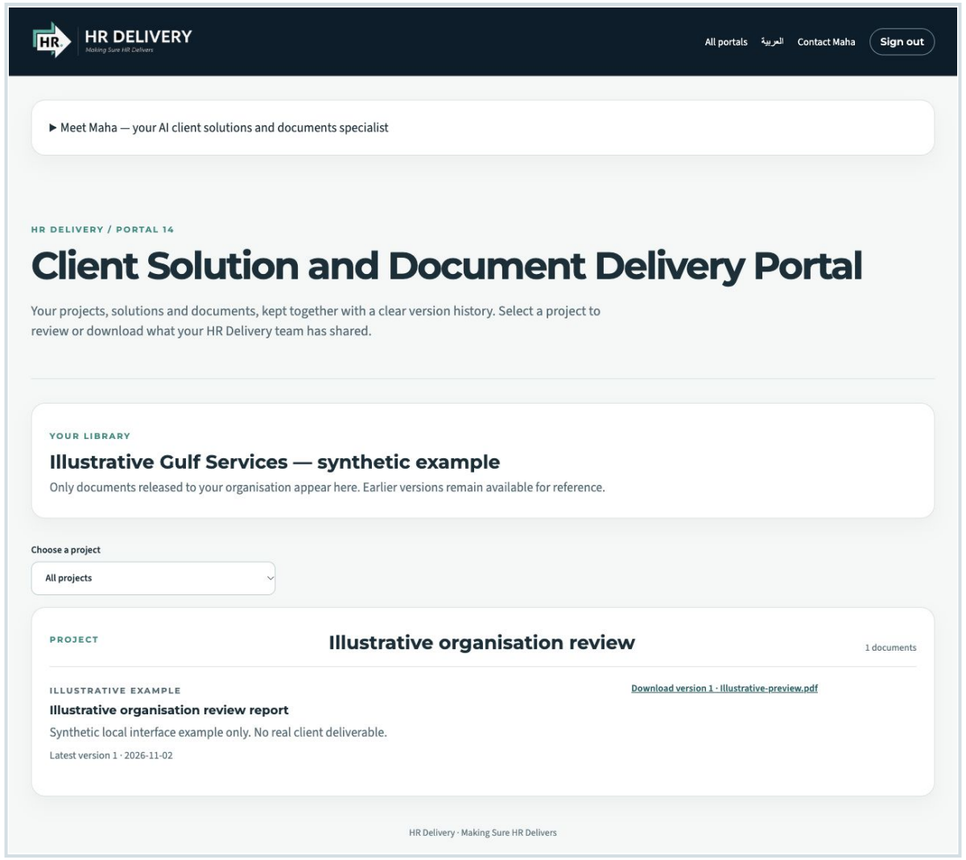
Manage client references and access-code changes

05 Verify the outcome and retain context

Confirm that the recipient can reach the intended collection. Retain the administrative reference without exposing the credential in routine records.

CHECK Checkpoint: the access issue is resolved and traceable.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

04 Authorised staff: customers, membership and billing

Manage commercial context separately from the client document library.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / L-04-01

OPEN SOURCE

Open the Connected Workspace and choose the desk

Select the staff function appropriate to the task.

WHO USES THIS Authorised reception or commercial staff

BEFORE YOU BEGIN

- Authorised staff account
- Assigned administrative responsibility

WHAT YOU WILL HAVE

- Correct authorised administrative desk

CHECK BEFORE YOU FINISH

- Staff role and desk match
- Correct record context
- Employee ERP treated as a separate workflow

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The current welcome sign-in and an earlier reviewed desk overview are illustrated. Private staff administration was not entered; its protected procedures are source-described.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 1–1 OF 5

OPEN SOURCE

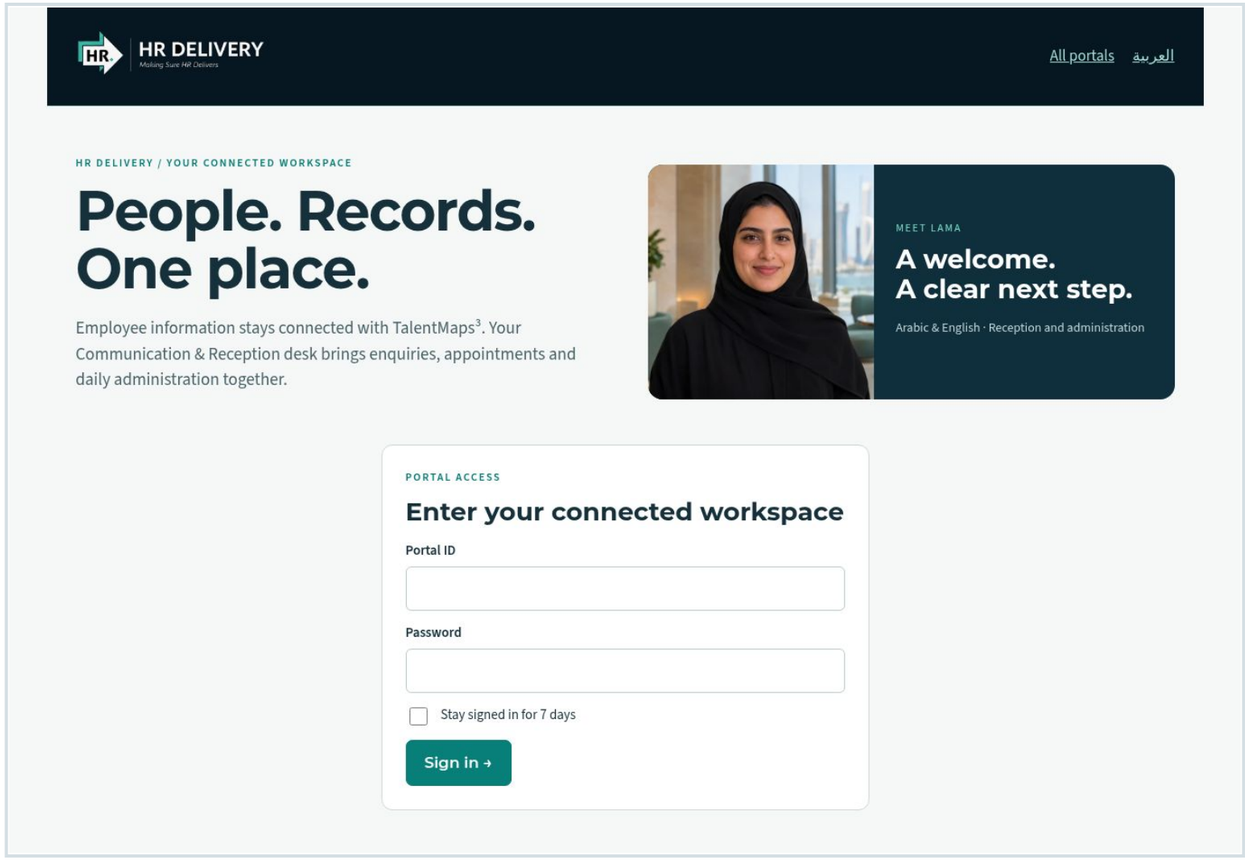
Open the Connected Workspace and choose the desk

01 Open and enter the Connected Workspace

Open the Connected Workspace link. Complete Portal ID and Password with your issued welcome credentials, then select Sign in. Private reception administration requires separate staff access.

CHECK The welcome area opens if the credentials are accepted.

CURRENT LIVE SCREEN



Current Connected Workspace sign-in. This welcome access is separate from the private staff desk.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 2–3 OF 5

OPEN SOURCE

Open the Connected Workspace and choose the desk

02 Choose the relevant function

The observed shell names Clients & membership, Billing & invoices, Business Document Studio, Calendar & reception, Email Studio, Mailing lists & newsletters and Connections.

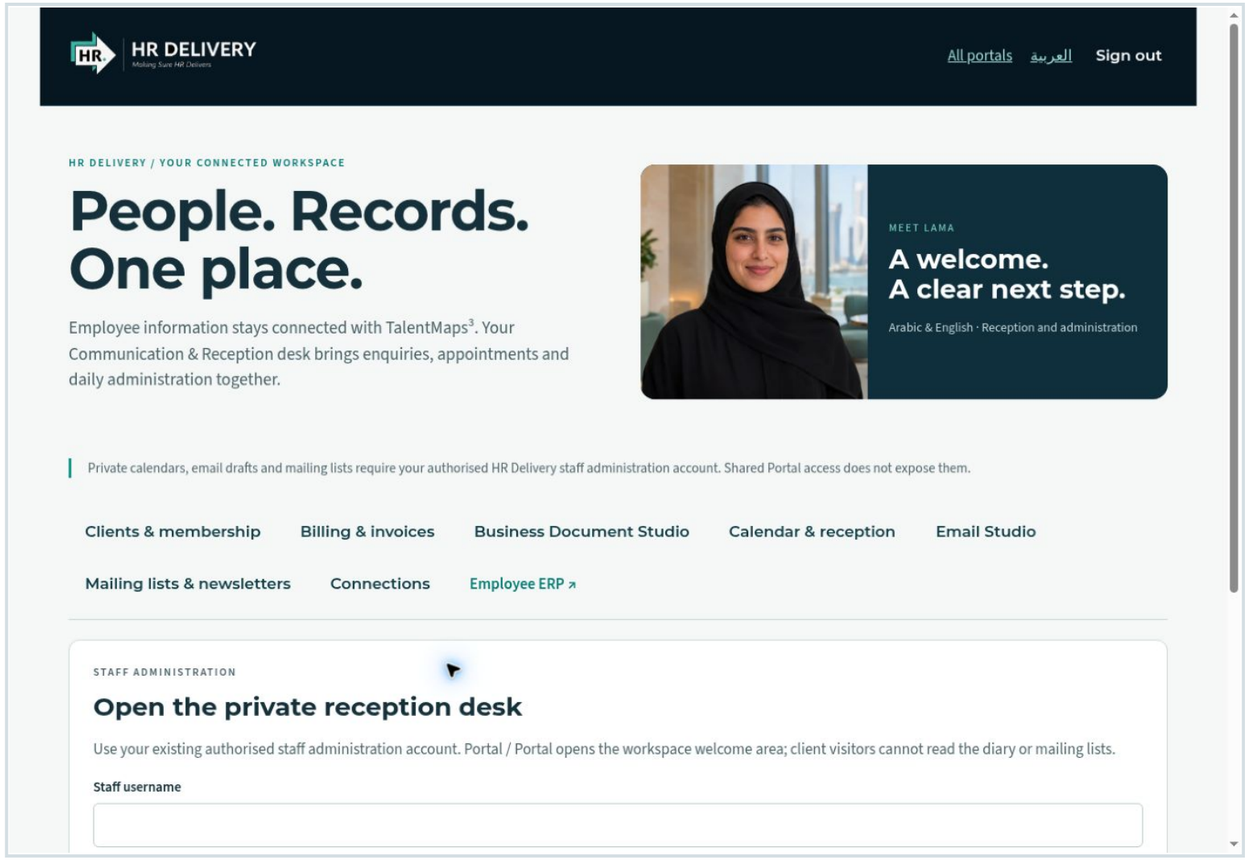
CHECK The task is matched to the appropriate desk.

03 Use the authorised staff sign-in

Private calendars, drafts, lists and commercial records require staff access. Complete Staff username and Staff password, then Open staff desk when your access permits.

CHECK Checkpoint: the authorised desk opens.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 4–5 OF 5

OPEN SOURCE

Open the Connected Workspace and choose the desk

04 Confirm the organisation or record

Check the relevant customer, invoice, appointment or draft before beginning. Avoid moving between similarly named records without checking context.

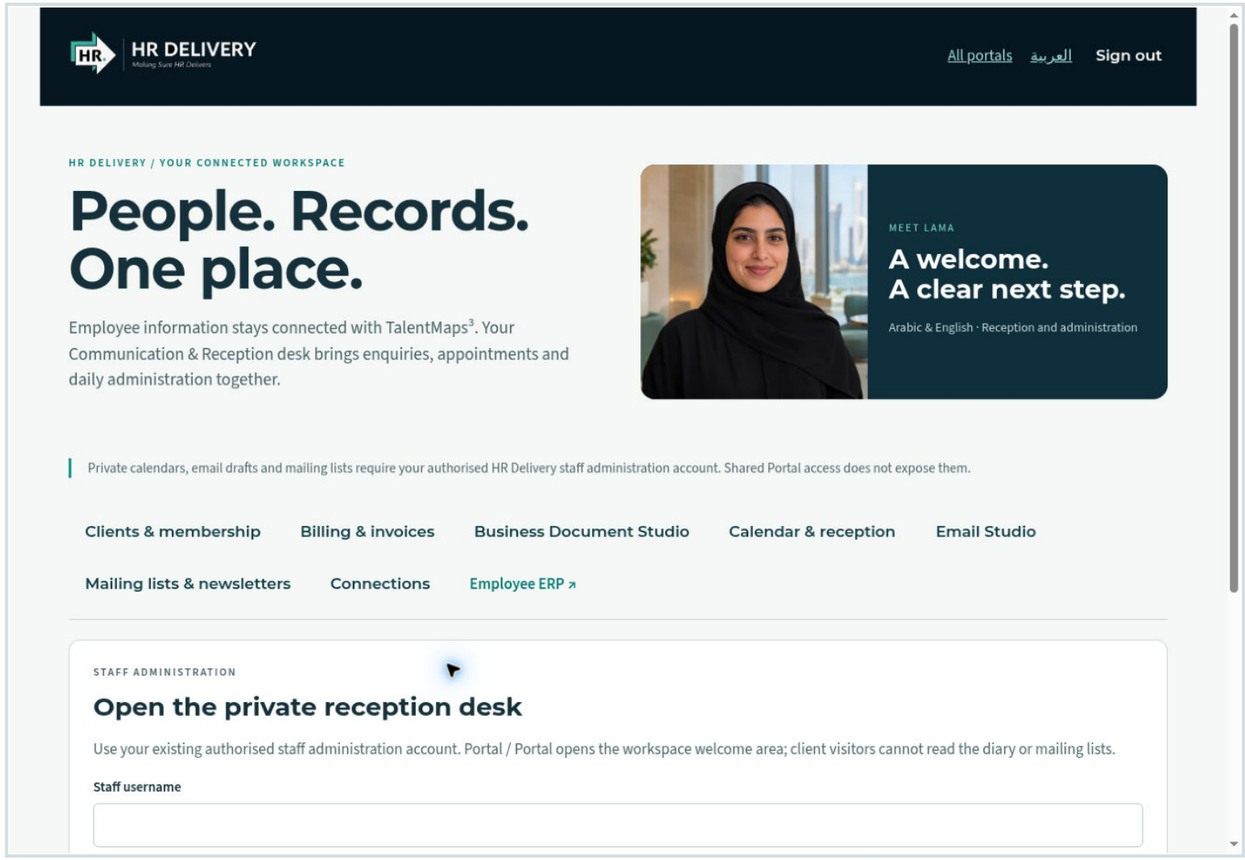
CHECK Checkpoint: the intended administrative record is selected.

05 Keep employee ERP work separate

The connected workspace also links to Employee ERP. Use its dedicated people-record procedures and permissions for employee profiles or assignments.

CHECK Commercial administration is not confused with employee-record maintenance.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / L-04-02

OPEN SOURCE

Maintain customers, memberships and portal entitlements

Keep service agreements and access arrangements aligned.

WHO USES THIS Authorised commercial administrator

BEFORE YOU BEGIN

- Approved customer details
- Agreed services and commercial terms
- Entitlement authority

WHAT YOU WILL HAVE

- Maintained customer and membership record
- Aligned portal-entitlement information

CHECK BEFORE YOU FINISH

- Agreement supports the entitlement
- Access types remain distinct
- Renewal date and fee basis checked

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private customer, membership or entitlement changes was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 1–2 OF 6

OPEN SOURCE

Maintain customers, memberships and portal entitlements

01 Open 'Clients & membership'

Locate the existing company record or use the supported registration workflow. Check the organisation name before creating a duplicate.

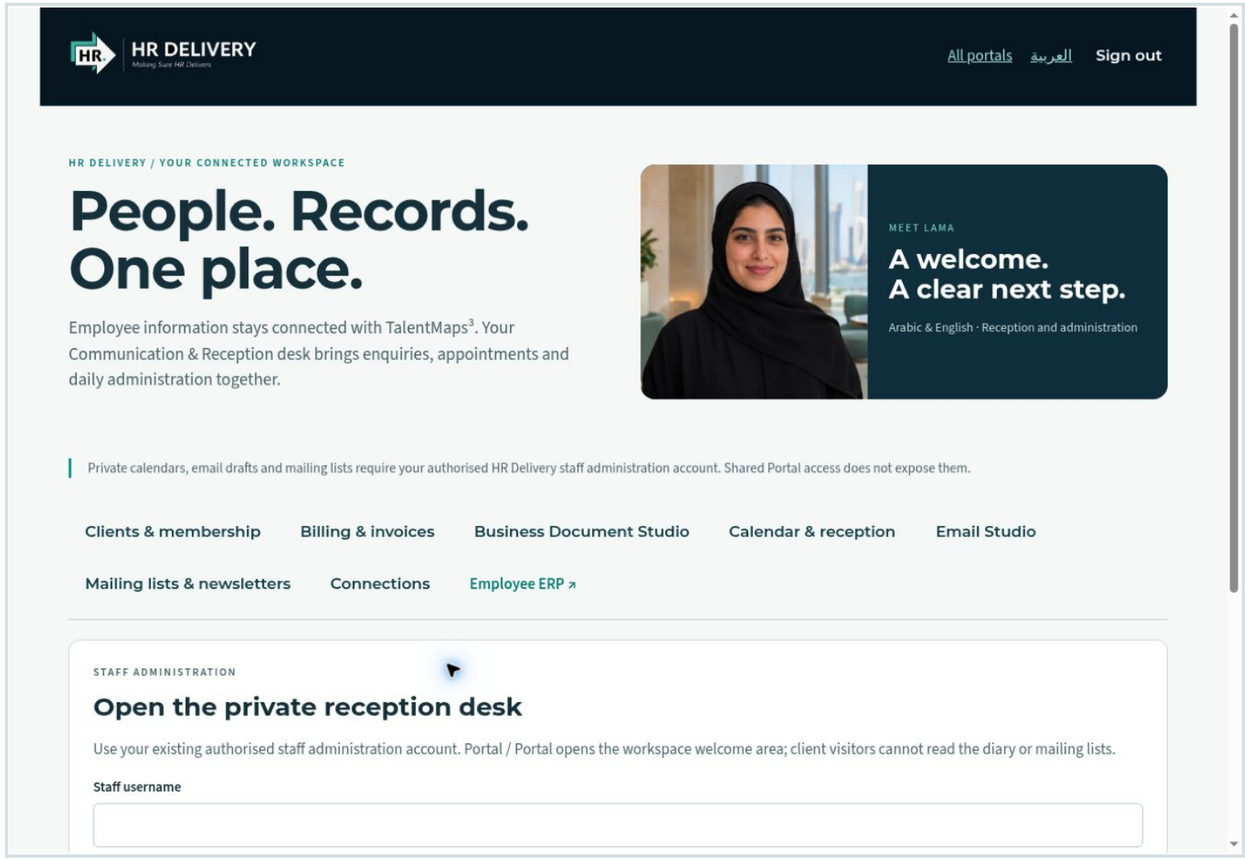
CHECK Checkpoint: the correct customer record is selected.

02 Complete the company and contact context

Maintain the relevant contacts, staff count, notes and agreement references. Use only the information needed to administer the relationship.

CHECK Checkpoint: the customer record supports the agreed service.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 3–4 OF 6

OPEN SOURCE

Maintain customers, memberships and portal entitlements

03 Review portal entitlements

Check which department portals the agreement covers and who is authorised to administer access. Access changes should follow the approved service scope.

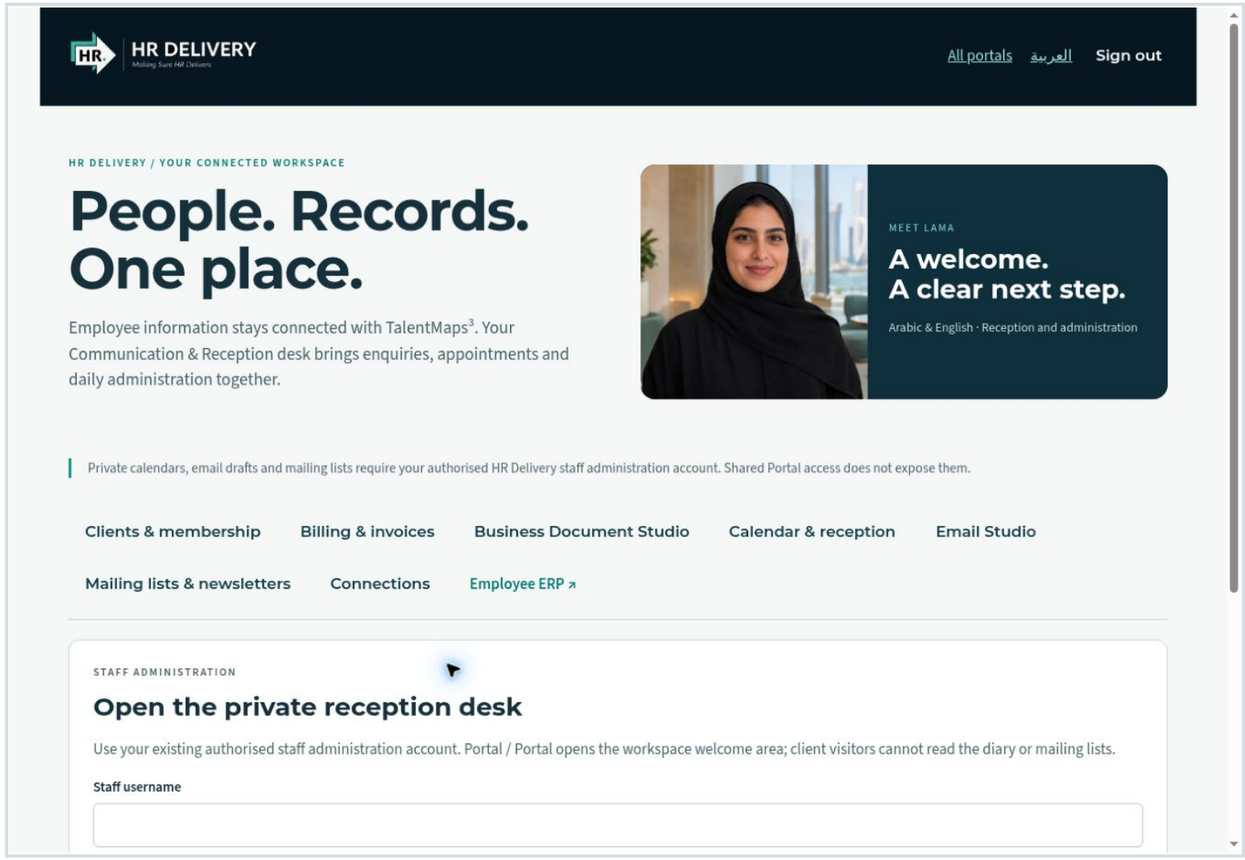
CHECK Checkpoint: the entitlement record matches the agreement.

04 Handle customer access details carefully

Use the supported access-code or password administration for the intended customer. Keep collection codes, department access and specialist-service codes distinct.

CHECK Checkpoint: access instructions match the specific service.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 5–6 OF 6

OPEN SOURCE

Maintain customers, memberships and portal entitlements

05 Check usage and renewal context

Review customer-code usage where available, monthly or annual fees and the renewal date. Follow up discrepancies with the account owner before changing terms.

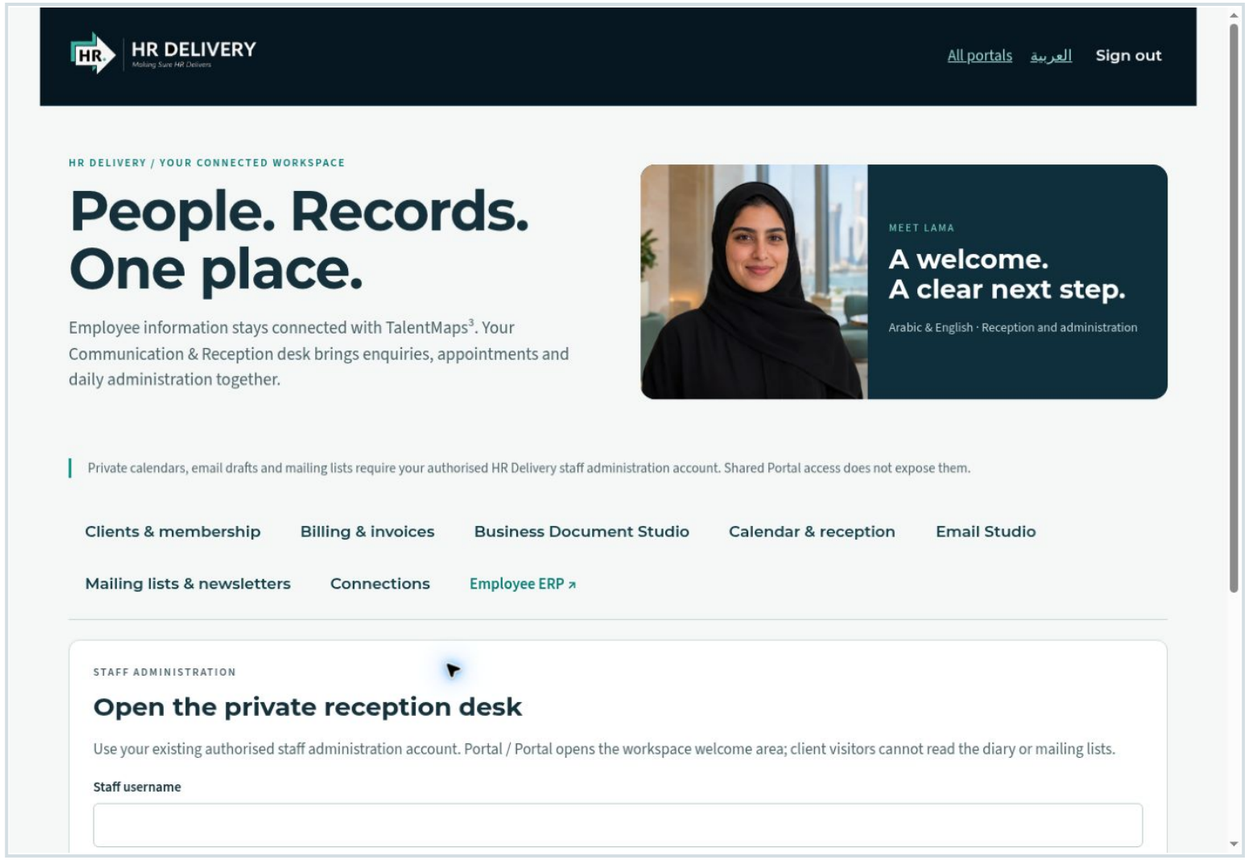
CHECK Checkpoint: service usage and commercial records can be reconciled.

06 Retain a clear change record

Confirm the revised details and any required approval. Prepare a customer handover or renewal document where the change requires communication.

CHECK Checkpoint: the current record and the client's understanding are aligned.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / L-04-03

OPEN SOURCE

Prepare an invoice and record an external receipt

Create a clear billing document and distinguish it from payment collection.

WHO USES THIS Authorised billing administrator

BEFORE YOU BEGIN

- Approved commercial terms
- Correct bill-to details
- Authority to issue or record payment information

WHAT YOU WILL HAVE

- Branded invoice PDF
- Invoice history and external-receipt record where authorised

CHECK BEFORE YOU FINISH

- Invoice agrees with approved terms
- Currency and totals checked
- External receipt is evidenced
- Invoice creation is not payment collection

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private billing controls were not entered. The service inventory describes invoice generation and external-receipt recording; online and recurring payment collection are not connected.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 1–2 OF 6

OPEN SOURCE

Prepare an invoice and record an external receipt

01 Open 'Billing & invoices'

Confirm the customer and agreement before starting an invoice. Check the billing settings that apply to the organisation.

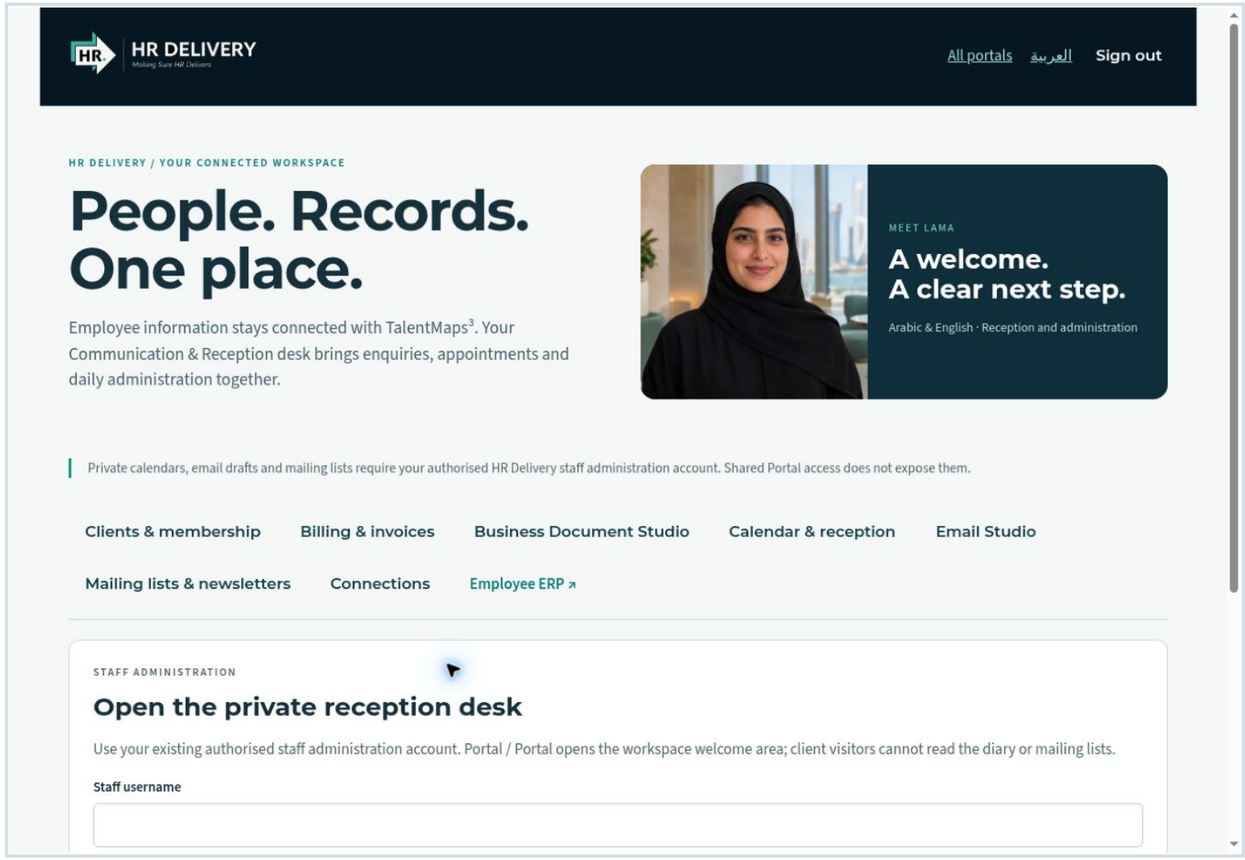
CHECK Checkpoint: the intended billing context is selected.

02 Check invoice particulars

Review the customer identity, billing address, document date, reference, items, currency, amounts and payment terms supported by the workspace. Resolve discrepancies with the agreement.

CHECK Checkpoint: the draft represents the approved commercial arrangement.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 3–4 OF 6

OPEN SOURCE

Prepare an invoice and record an external receipt

03 Review the branded invoice

Use the supported preview or generation workflow. Check calculations, descriptions, currency, identifiers and any required statutory particulars.

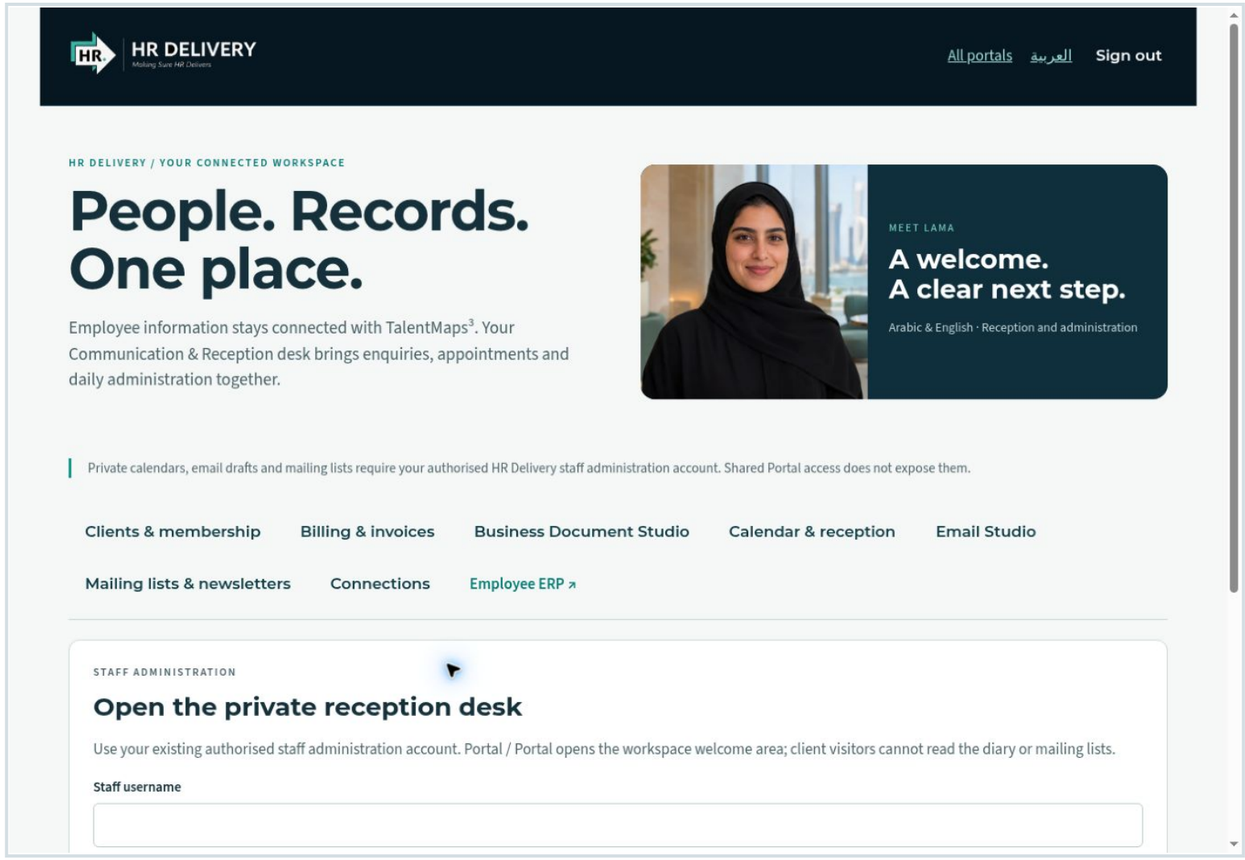
CHECK Checkpoint: the draft is accurate and ready for the organisation's review.

04 Download and inspect the PDF

Use the available PDF output, open the complete file and confirm it matches the approved draft. Follow the agreed issue process separately.

CHECK Checkpoint: a readable invoice file is retained.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: CUSTOMERS, MEMBERSHIP AND BILLING / STEPS 5–6 OF 6

OPEN SOURCE

Prepare an invoice and record an external receipt

05 Use invoice history for follow-up

Locate the retained invoice by customer and reference. Ensure that later discussion or adjustments refer to the same document.

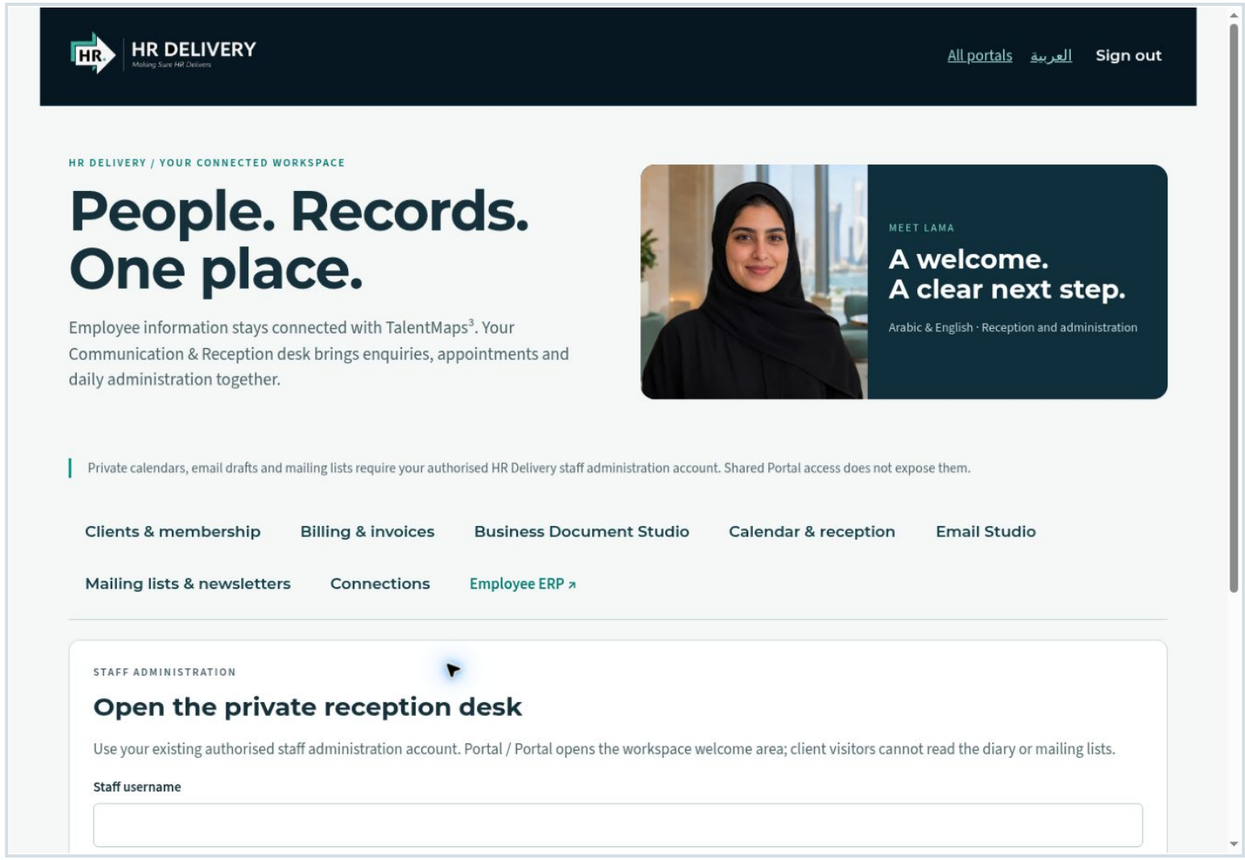
CHECK Checkpoint: the relevant invoice and history are traceable.

06 Record an externally received payment

When authorised and supported by evidence, record the external receipt against the correct invoice. Invoice generation does not collect money online or establish a recurring payment.

CHECK Checkpoint: the payment record corresponds to an actual external receipt.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

05 Authorised staff: business documents and communication

Prepare consistent business material and coordinate delivery.

07 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-01

OPEN SOURCE

Choose the right business-document starting format

Match the document to its commercial or delivery purpose.

WHO USES THIS Authorised business-document preparer

BEFORE YOU BEGIN

- Client or internal purpose
- Approved factual content
- Required output format

WHAT YOU WILL HAVE

- Completed business-document draft
- Versioned PDF or Word output where supported

CHECK BEFORE YOU FINISH

- Purpose matches template
- No unresolved example content
- Output reviewed before issue

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private business-document editing, versioning or export was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 6

OPEN SOURCE

Choose the right business-document starting format

01 Open 'Business Document Studio'

Use the authorised Connected Workspace. Decide whether the task is a presentation, commercial offer, letter, project plan, meeting record or handover.

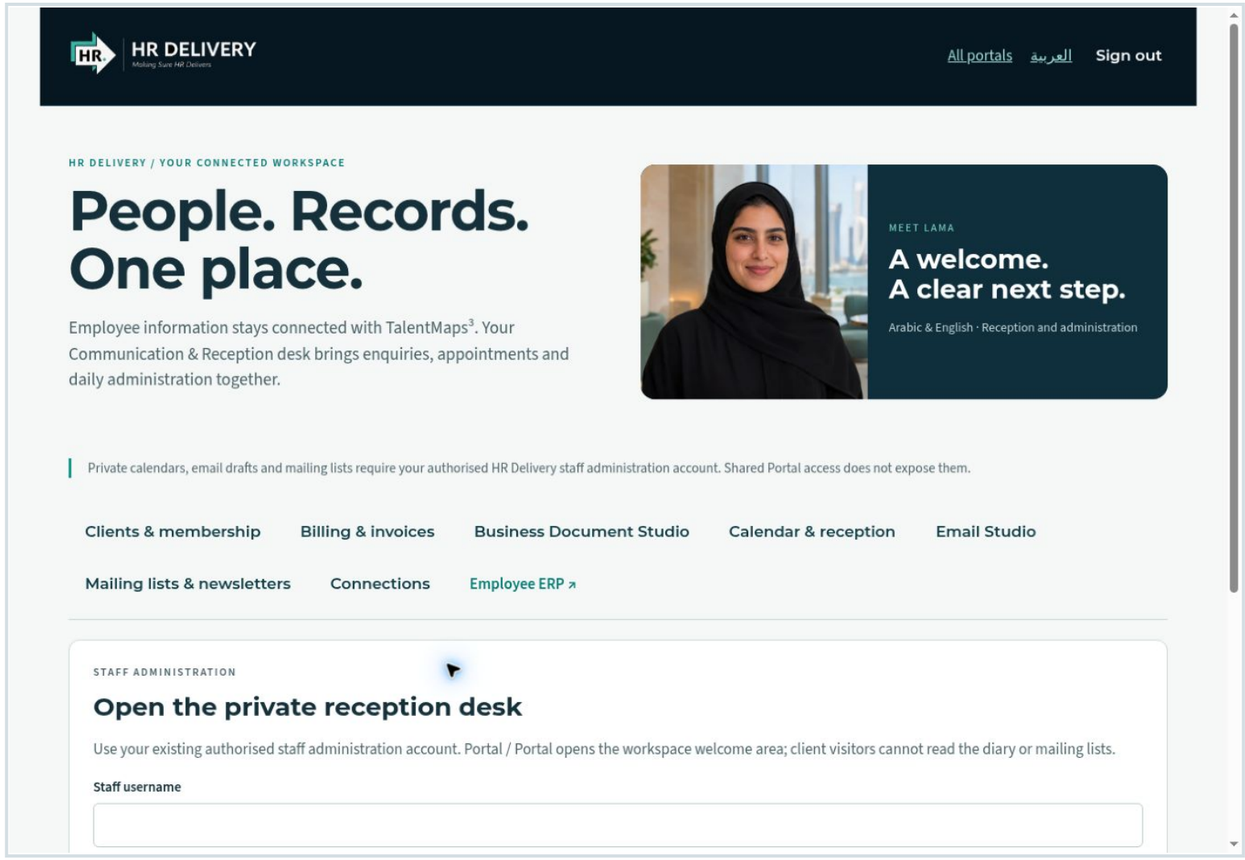
CHECK Checkpoint: the appropriate document family is identified.

02 Select the relevant starter

Choose the supported template listed in the reference table. A proposal explains the solution; a quotation states a priced offer; a statement of work defines the agreed delivery.

CHECK Checkpoint: the selected format matches the purpose.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 6

OPEN SOURCE

Choose the right business-document starting format

03 Complete the contextual particulars

Enter the client, project, date, title, author and reference required by that template. Check the intended recipient and review owner.

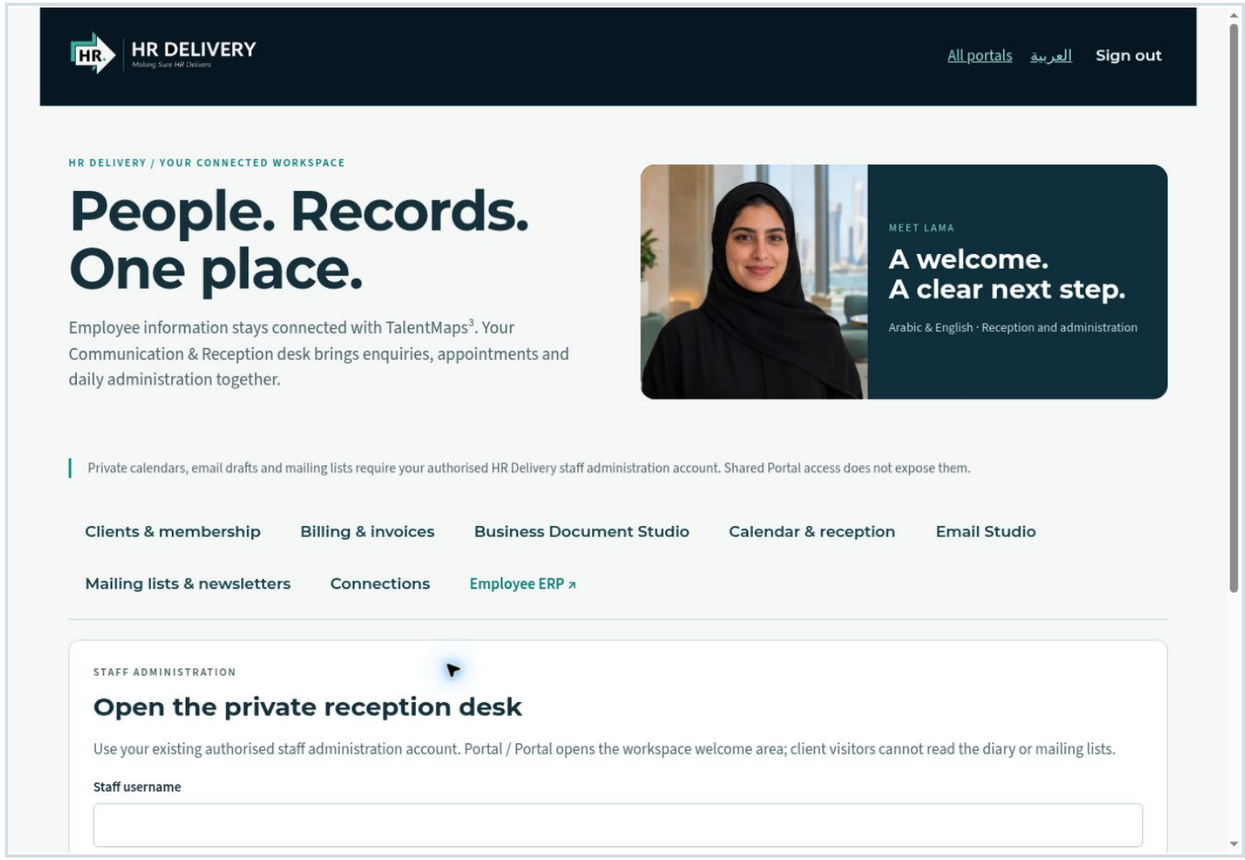
CHECK Checkpoint: the document belongs to the correct relationship and assignment.

04 Develop the substantive content

Replace example text with the approved scope, facts, deliverables, timetable, responsibilities or communication. Use clear headings and client-facing language.

CHECK Checkpoint: the document is complete enough for meaningful review.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–6 OF 6

OPEN SOURCE

Choose the right business-document starting format

05 Review layout and factual consistency

Check names, dates, amounts, responsibilities, page breaks and appendices. Resolve placeholders before generating an issue copy.

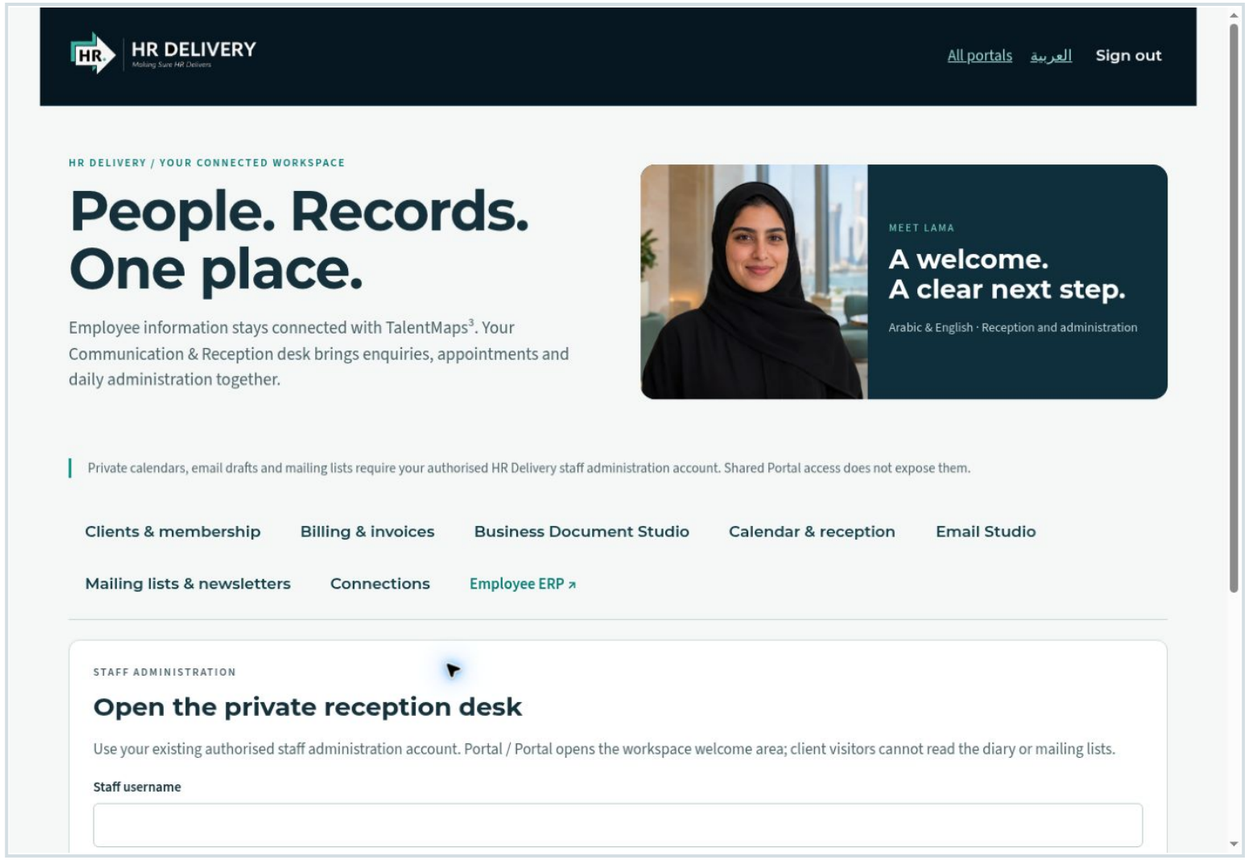
CHECK Checkpoint: the document is coherent and professionally usable.

06 Retain the edition and export

Use the supported version workflow and PDF or Word output. Open the final file and obtain the relevant approval before sending or releasing it.

CHECK Checkpoint: the retained edition and approved output agree.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-02

OPEN SOURCE

Prepare a proposal, quotation or statement of work

Make the client offer and delivery responsibilities clear.

WHO USES THIS Authorised commercial or project lead

BEFORE YOU BEGIN

- Agreed client need
- Approved pricing and scope
- Review and commitment authority

WHAT YOU WILL HAVE

- Reviewable commercial or delivery offer

CHECK BEFORE YOU FINISH

- Scope and price align
- Client dependencies explicit
- Authorised review before commitment

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private proposal, quotation or statement-of-work preparation was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 5

OPEN SOURCE

Prepare a proposal, quotation or statement of work

01 Choose the document purpose

Use the client proposal for the recommended solution, the quotation for the priced offer, or the statement of work for the defined assignment.

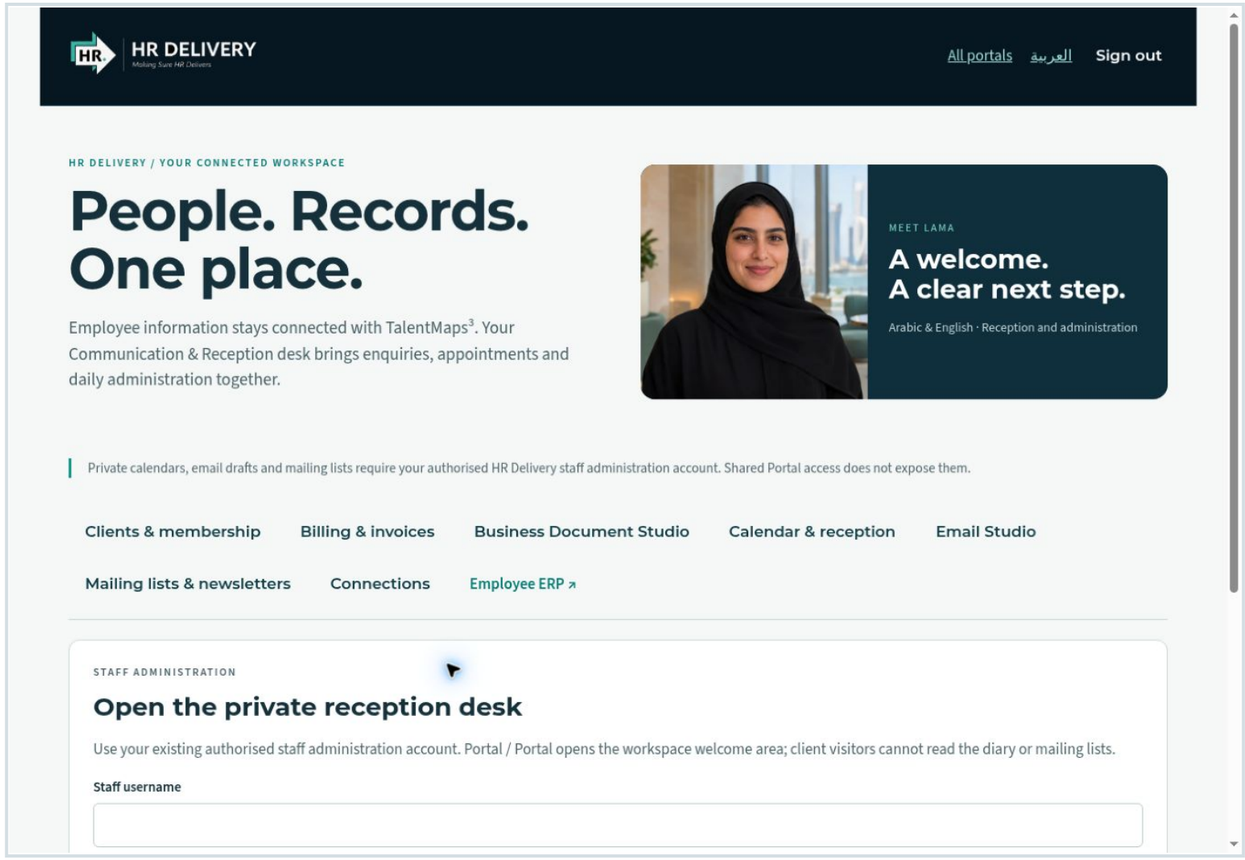
CHECK The document’s commercial purpose is explicit.

02 Describe the need and proposed work

State the client context, objectives, activities and deliverables. Keep assumptions and exclusions clear enough for the client to assess the offer.

CHECK The client can understand what is being proposed.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 5

OPEN SOURCE

Prepare a proposal, quotation or statement of work

03 Complete timetable and responsibilities

Specify the stages, dependencies, client inputs, review points and accountable people. Avoid promising a date that depends on unresolved inputs.

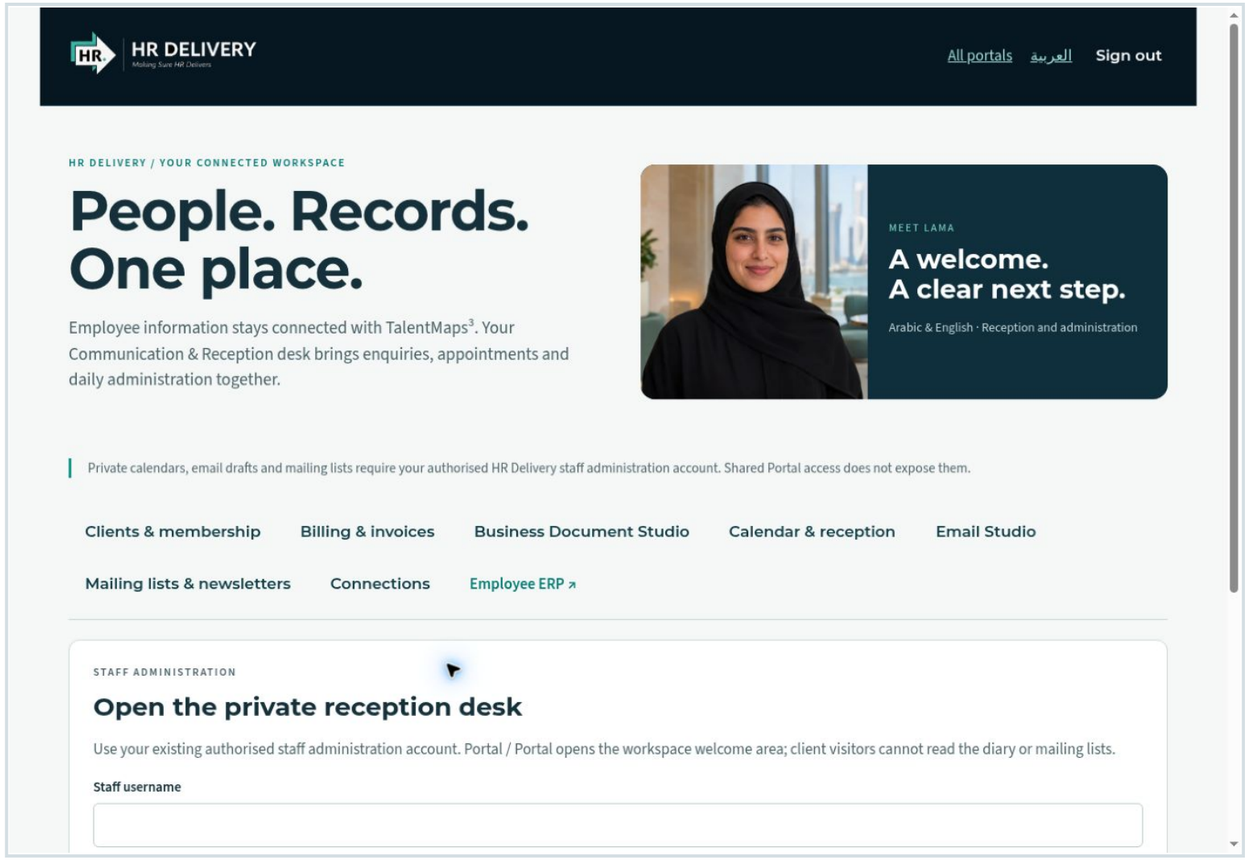
CHECK The delivery process can be planned and discussed.

04 Check commercial particulars

Review currency, fees, expenses, billing timing, validity and any applicable terms with the authorised commercial owner.

CHECK The document reflects approved terms.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–5 OF 5

OPEN SOURCE

Prepare a proposal, quotation or statement of work

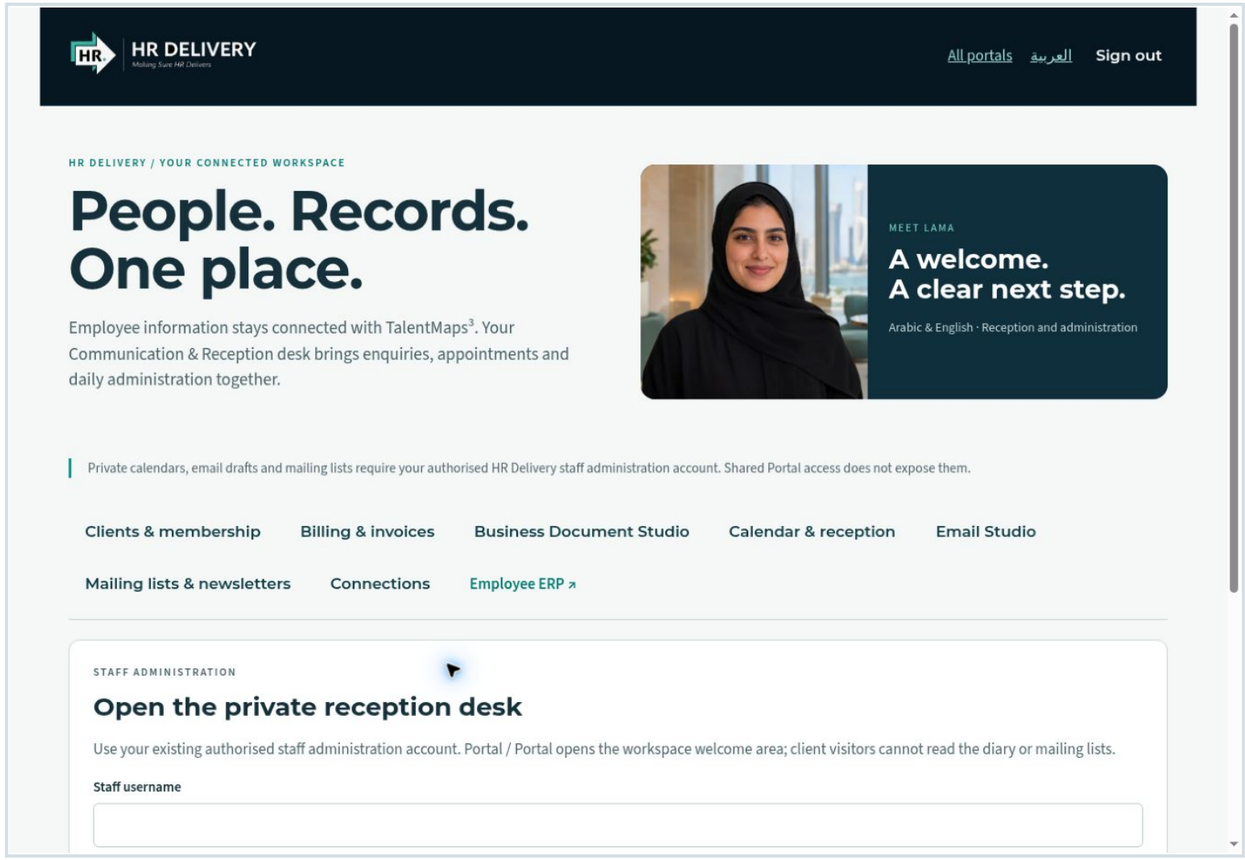
05

Review and prepare the issue copy

Check consistency across the proposal, quotation and statement of work where more than one is used. Generate the supported output and obtain issue authority.

CHECK Checkpoint: the package is accurate, consistent and ready for the agreed client route.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-03

OPEN SOURCE

Prepare meeting, progress and handover documents

Turn discussions and delivery milestones into clear next actions.

WHO USES THIS Authorised project coordinator

BEFORE YOU BEGIN

- Meeting or project context
- Agreed actions and owners
- Current deliverable list

WHAT YOU WILL HAVE

- Meeting or progress record
- Document-delivery handover

CHECK BEFORE YOU FINISH

- Actions have owners and dates
- Deliverables include versions
- Access credentials handled separately

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private meeting, progress or handover document preparation was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 5

OPEN SOURCE

Prepare meeting, progress and handover documents

01 Select the appropriate template

Use a meeting agenda before the discussion, a meeting record/action log afterwards, a client progress report during delivery or a document-delivery handover at release.

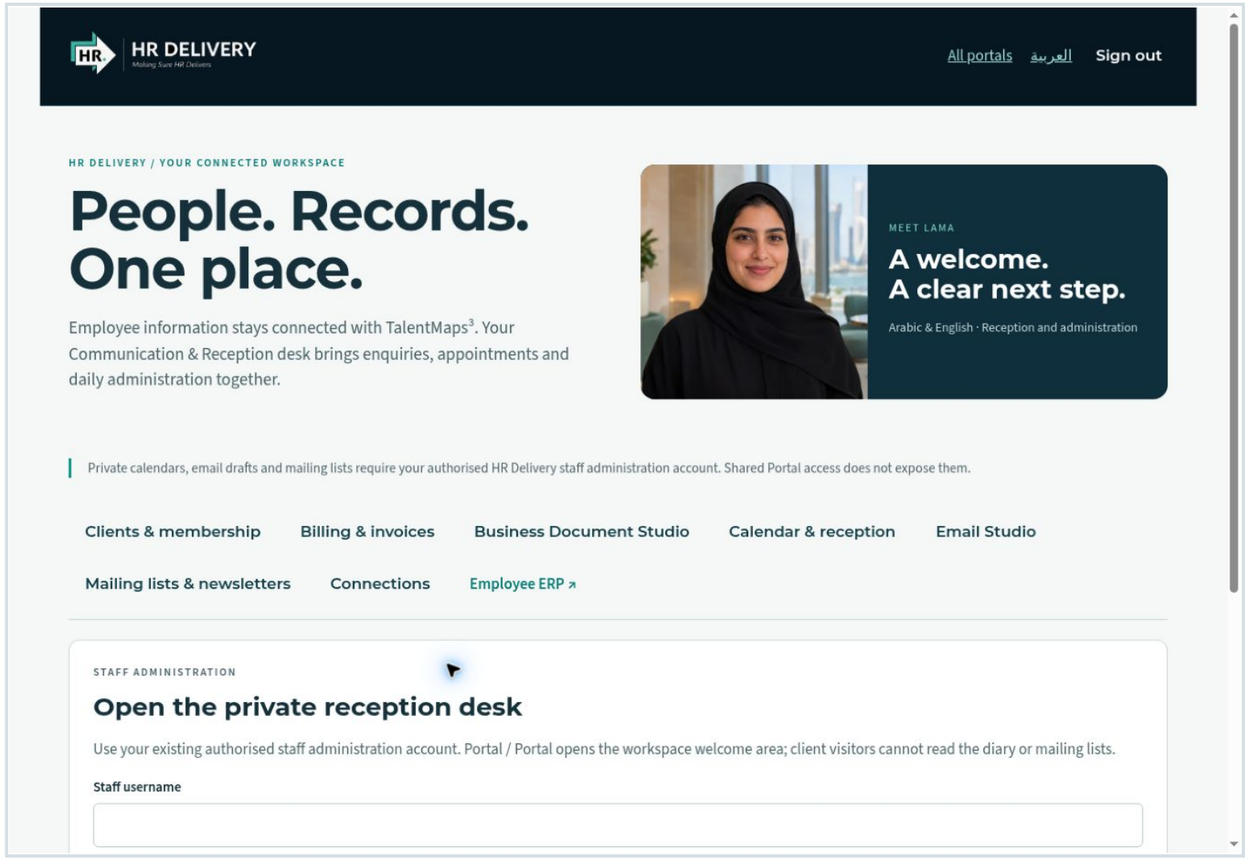
CHECK The template matches the stage of the work.

02 Complete the purpose and context

Identify the project, date, participants or recipient, period covered and decisions required. Link the document to the relevant assignment.

CHECK The reader understands why the document exists.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–3 OF 5

OPEN SOURCE

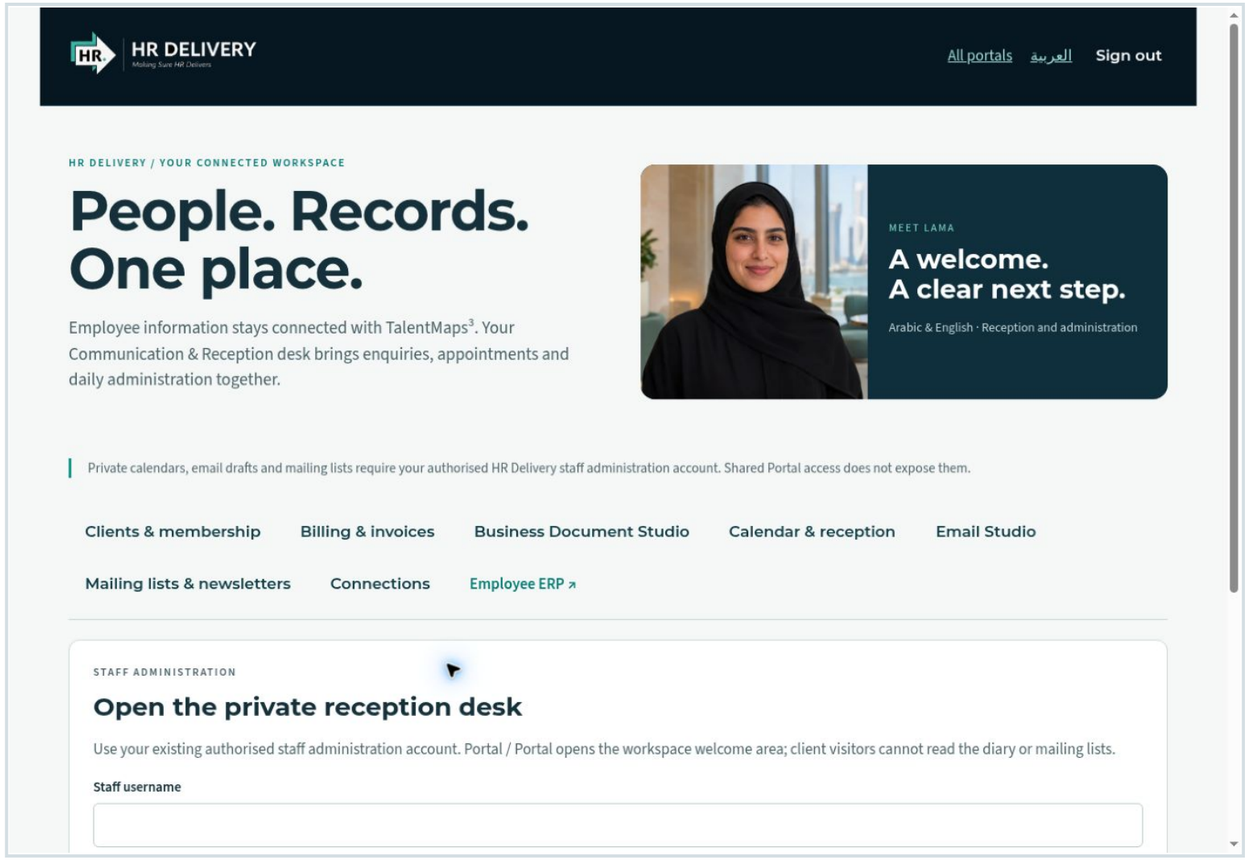
Prepare meeting, progress and handover documents

03 Make actions specific

Record the action, owner, due date and status. In a progress report distinguish completed work, current work, issues and decisions needed.

CHECK The next work can be assigned and followed up.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 4–5 OF 5

OPEN SOURCE

Prepare meeting, progress and handover documents

04 Identify deliverables precisely

For a handover, list the document title, version, purpose and what the client should do next. Use the collection route without placing private codes in a broadly shared document.

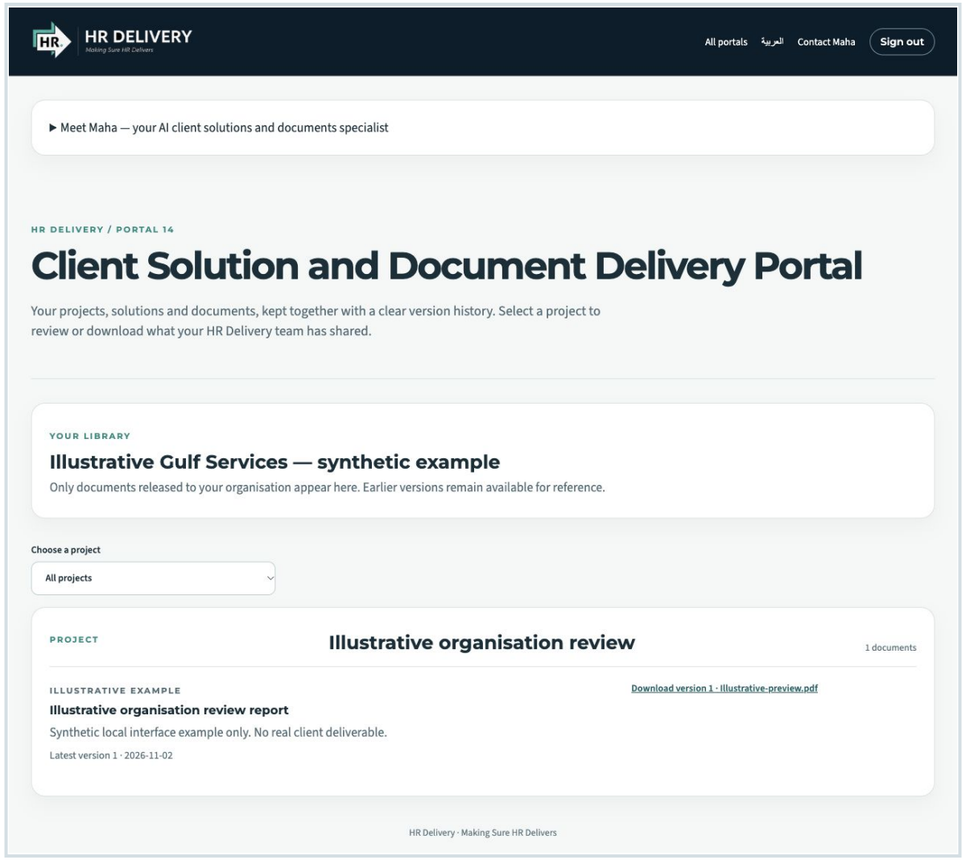
CHECK The client can locate and use the correct edition.

05 Review and retain the approved edition

Check the record with the responsible colleague, resolve factual issues, retain the version and use the supported export for the agreed audience.

CHECK Checkpoint: the record and handover accurately reflect the agreed work.

PUBLISHED DEMONSTRATION



Published synthetic client view for context; private staff editing and release controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-04

OPEN SOURCE

Prepare a business letter, welcome or renewal document

Give the client a clear administrative message with the correct next step.

WHO USES THIS Authorised client administrator

BEFORE YOU BEGIN

- Approved message and commercial context
- Correct recipient
- Current access or renewal arrangement

WHAT YOU WILL HAVE

- Client administrative letter or handover

CHECK BEFORE YOU FINISH

- Recipient verified
- Terms and dates accurate
- Document preparation separated from sending

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private client administration document preparation was not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 5

OPEN SOURCE

Prepare a business letter, welcome or renewal document

01 Choose the relevant template

Use the business letter, customer welcome/access handover or membership renewal template according to the intended message.

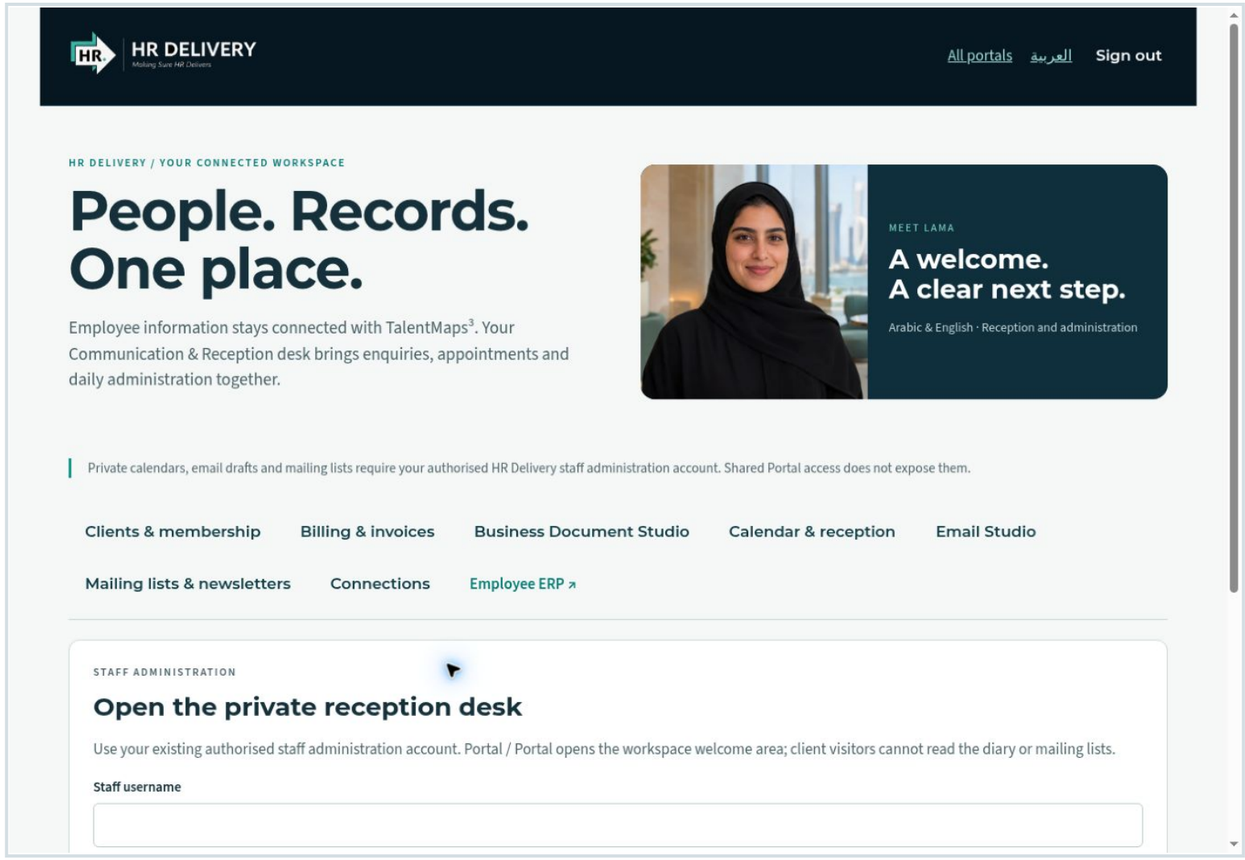
CHECK The format matches the communication.

02 Confirm the recipient and relationship

Check the organisation, contact name, service and reference. A welcome message and renewal reminder may need different recipients.

CHECK The message is addressed to the appropriate person.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 5

OPEN SOURCE

Prepare a business letter, welcome or renewal document

03 Complete the essential content

State the purpose, relevant service or dates, actions required and support route. Use approved fee or renewal information where applicable.

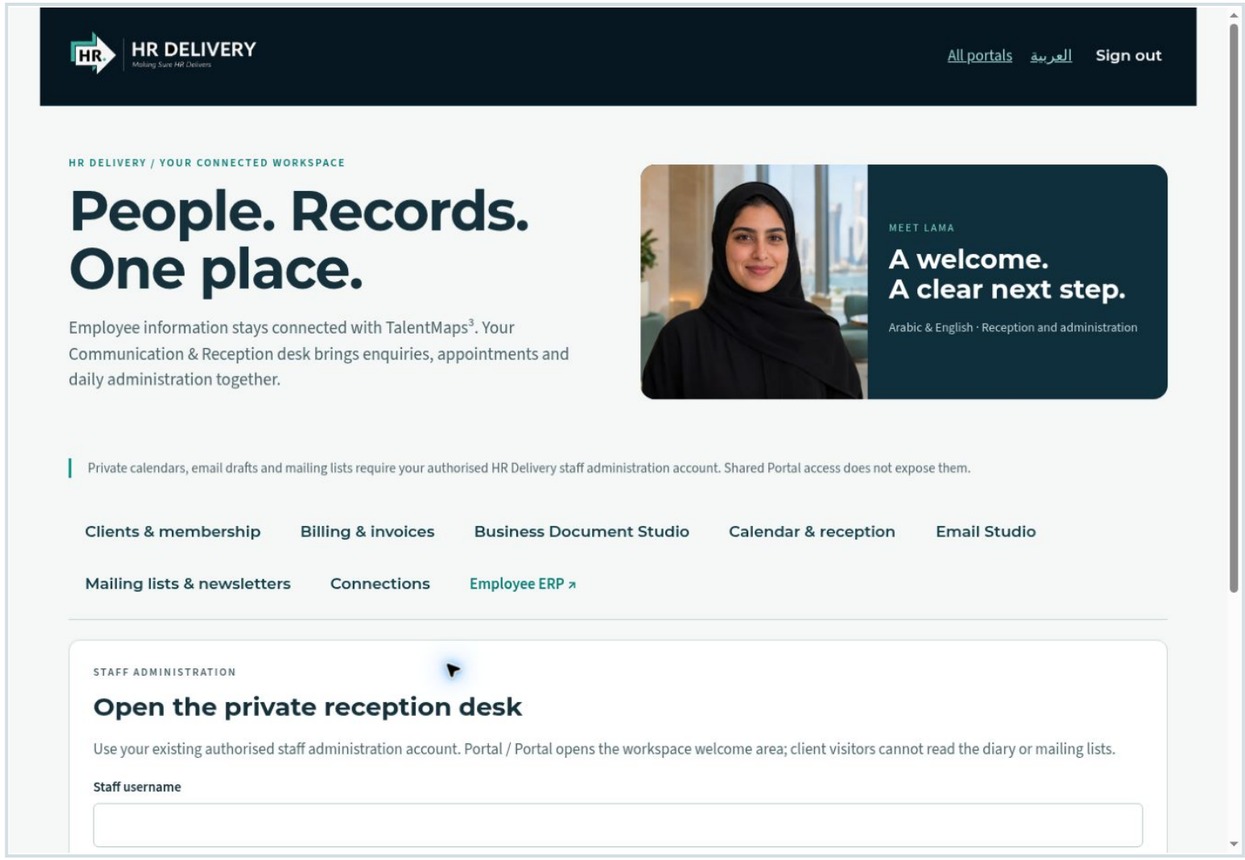
CHECK The client can understand the next step.

04 Handle access details through the agreed route

Keep passwords and private codes out of broadly shared documents. Explain which portal or collection the separate handover relates to.

CHECK The access instructions are clear without unnecessary exposure.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–5 OF 5

OPEN SOURCE

Prepare a business letter, welcome or renewal document

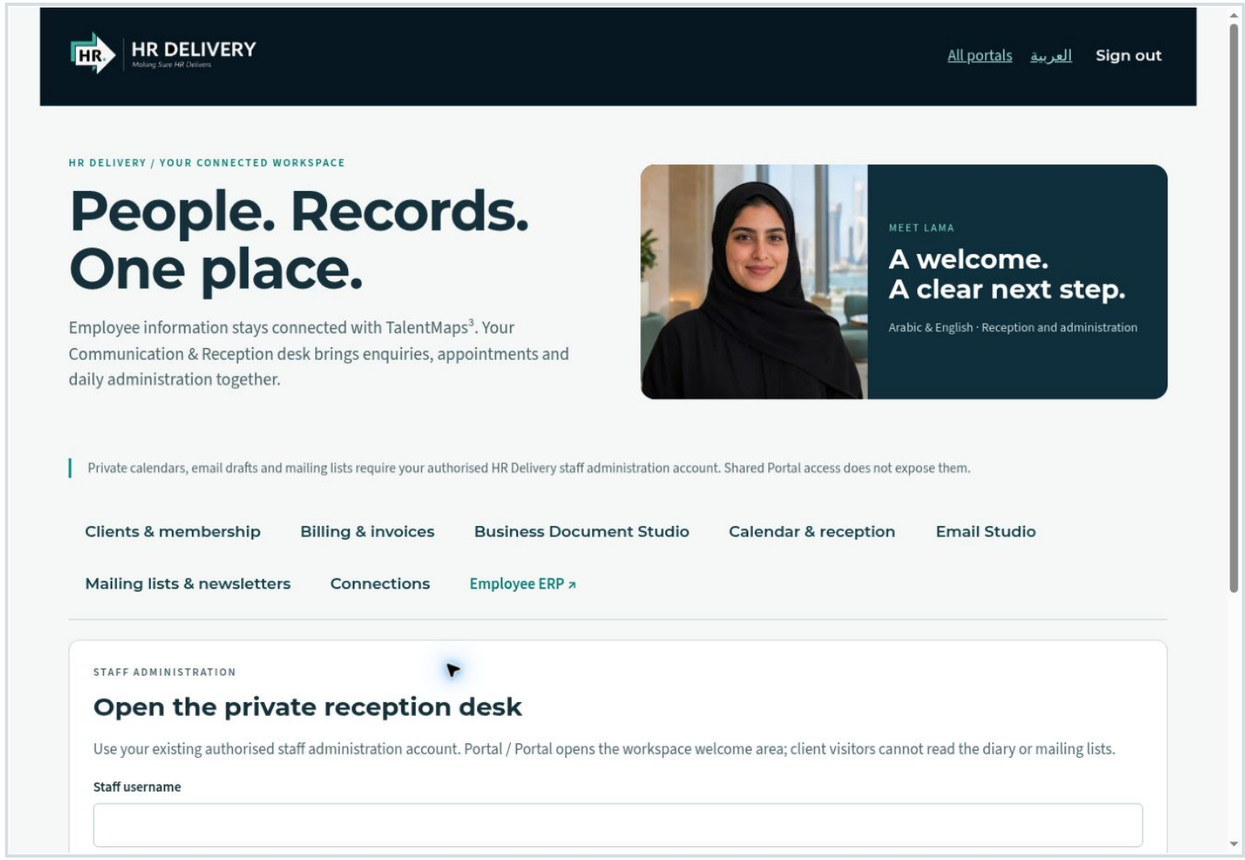
05

Review, export and arrange delivery

Check the final file and obtain the appropriate issue approval. Use the agreed communication channel; preparing the letter does not send it.

CHECK Checkpoint: the approved message is ready for the intended recipient.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-05

OPEN SOURCE

Manage appointment requests and the private diary

Coordinate an actual appointment through the authorised reception process.

WHO USES THIS Authorised reception administrator

BEFORE YOU BEGIN

- Staff calendar access
- Request details
- Dr Phillip’s confirmed availability

WHAT YOU WILL HAVE

- Reviewed appointment and diary status
- Morning briefing preview where authorised

CHECK BEFORE YOU FINISH

- Qatar time and duration checked
- Overlap and unavailable periods considered
- Communication delivery verified separately

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected workflow: the public description and published demonstration establish the capability. Private calendar, request-status or briefing changes were not exercised. Follow the controls displayed in your authorised account; confirm any differences with HR Delivery.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 6

OPEN SOURCE

Manage appointment requests and the private diary

01 Open 'Calendar & reception'

Enter the private desk using an authorised account. Select the relevant request from the reception inbox.

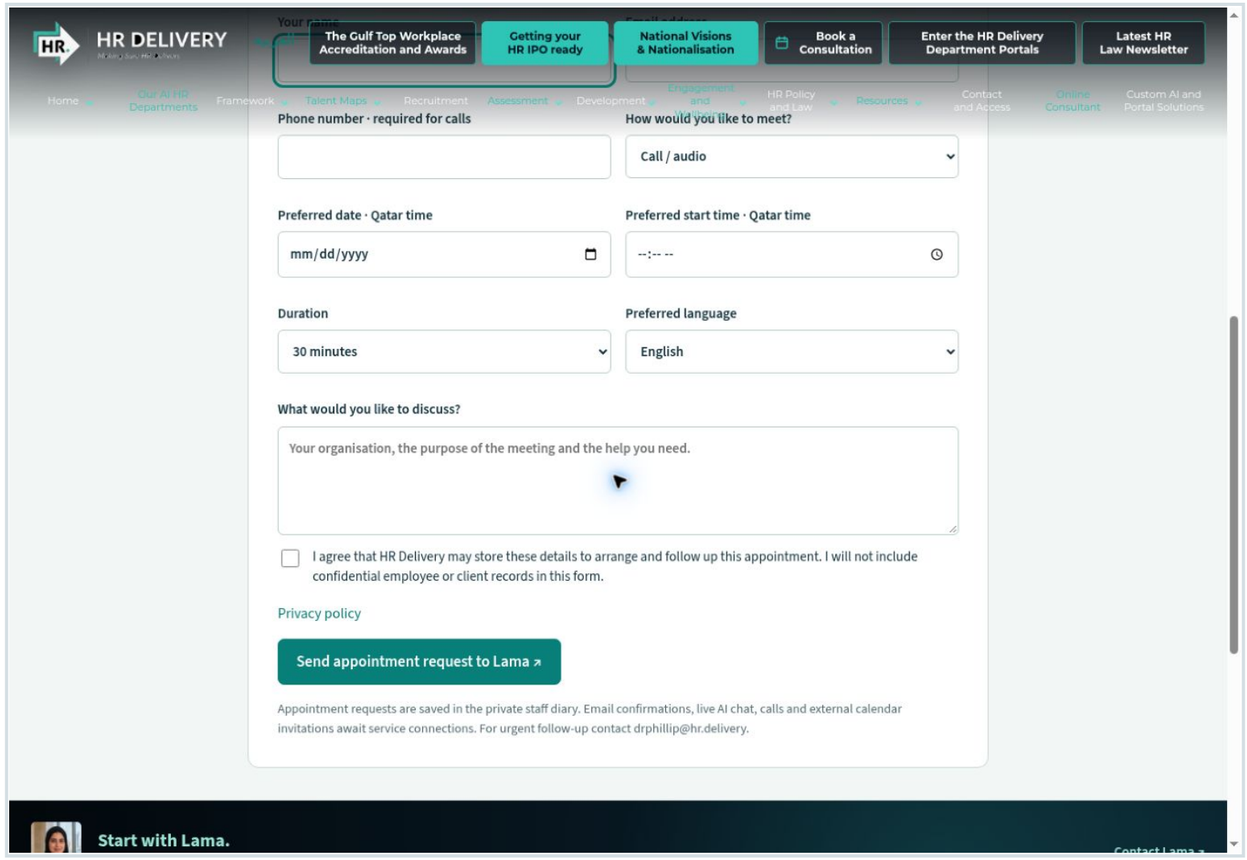
CHECK Checkpoint: the intended request and contact details are visible.

02 Review the request and diary

Check the requested mode, purpose, date, Qatar time, duration and language against Dr Phillip's diary. Review unavailable-time blocks and overlap checks.

CHECK Checkpoint: the proposed time is assessed against current availability.

CURRENT LIVE SCREEN



Public requester-input context; private diary, confirmation, cancellation and blocking controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 6

OPEN SOURCE

Manage appointment requests and the private diary

03 Decide the appropriate administrative response

Use the supported confirmation, decline or cancellation workflow within the reception authority. Resolve a conflicting slot before treating an appointment as confirmed.

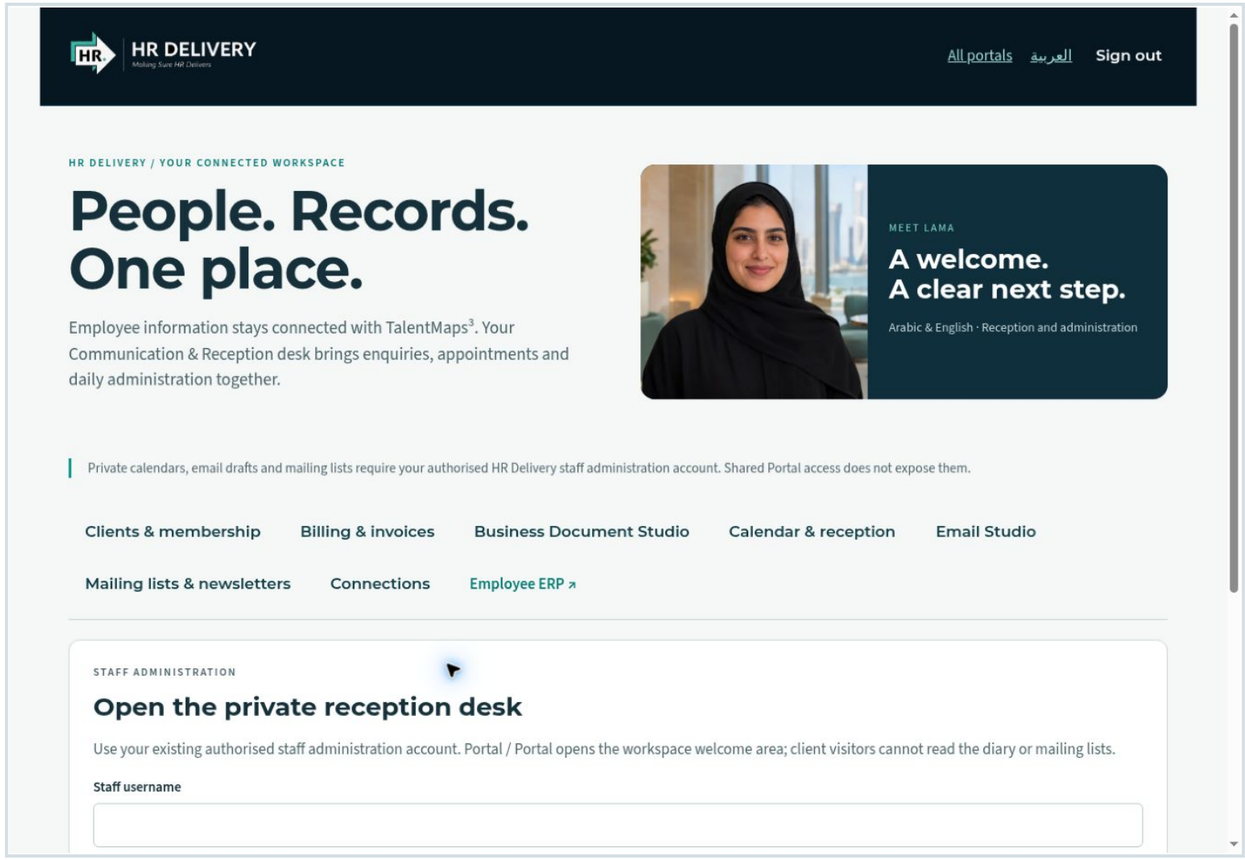
CHECK Checkpoint: the appointment has the intended administrative status.

04 Maintain unavailable time where authorised

Use the supported blocking workflow for agreed periods, then check how the block affects the diary and later requests.

CHECK Checkpoint: the calendar reflects approved unavailability.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–6 OF 6

OPEN SOURCE

Manage appointment requests and the private diary

05 Review the morning-diary briefing

Use the briefing preview to check the day's appointments and preparation context. Confirm that dates, times and changes are current.

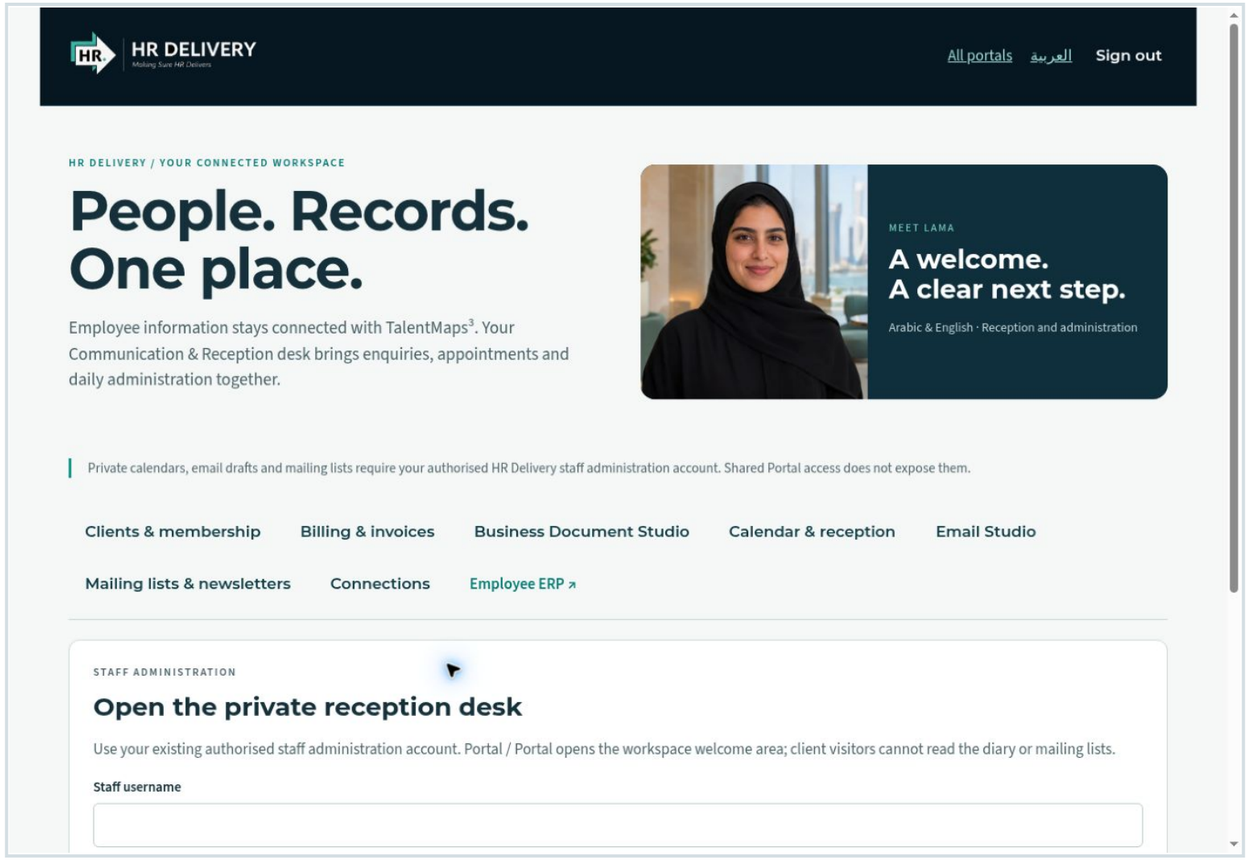
CHECK Checkpoint: the briefing is useful for the day's work.

06 Coordinate communication and calendar delivery

Use the active agreed route to inform the requester. The service inventory states that automatic emails, external-calendar synchronisation and morning-diary email await connections.

CHECK Checkpoint: a saved status is not mistaken for a delivered email or synchronised external event.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-06

OPEN SOURCE

Prepare saved email drafts and check service connections

Keep message preparation separate from verified delivery.

WHO USES THIS Authorised communication administrator

BEFORE YOU BEGIN

- Approved communication purpose
- Verified intended recipient
- Active service arrangements

WHAT YOU WILL HAVE

- Saved communication draft
- Confirmed channel-status context

CHECK BEFORE YOU FINISH

- Recipient and attachments checked
- Saving is not treated as sending
- Active connection verified

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private draft and connection administration were not entered. Specialist external communication connections are described as awaiting activation.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 5

OPEN SOURCE

Prepare saved email drafts and check service connections

01 Open 'Email Studio'

Use the authorised desk to prepare or locate the saved draft associated with the client or administrative task.

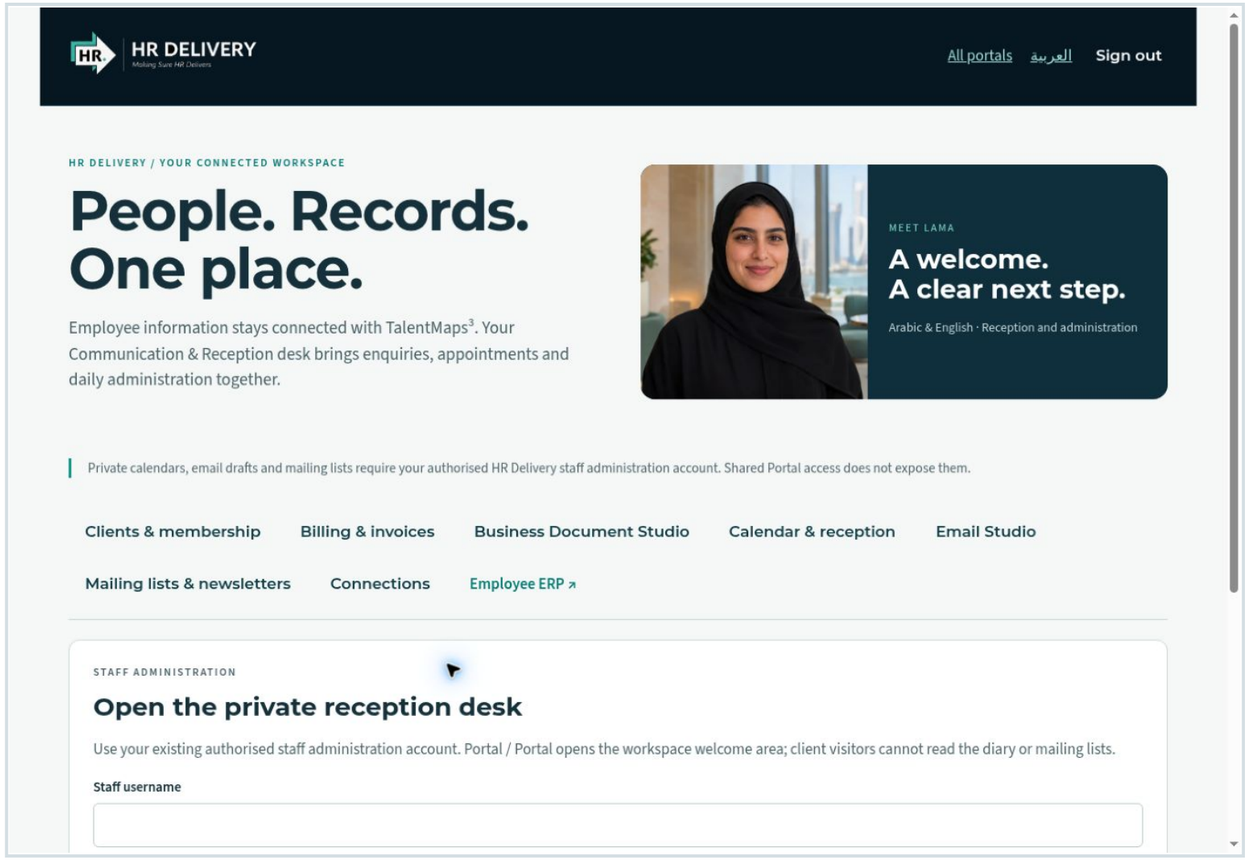
CHECK Checkpoint: the intended draft context is selected.

02 Complete and review the draft

Check recipient, subject, message, references and attachments against the approved purpose. Avoid including credentials or unnecessary private records.

CHECK Checkpoint: the draft is ready for meaningful review.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 5

OPEN SOURCE

Prepare saved email drafts and check service connections

03 Retain the draft through the supported workflow

Use the available draft controls in the authorised account. Do not assume that saving the content sends an email.

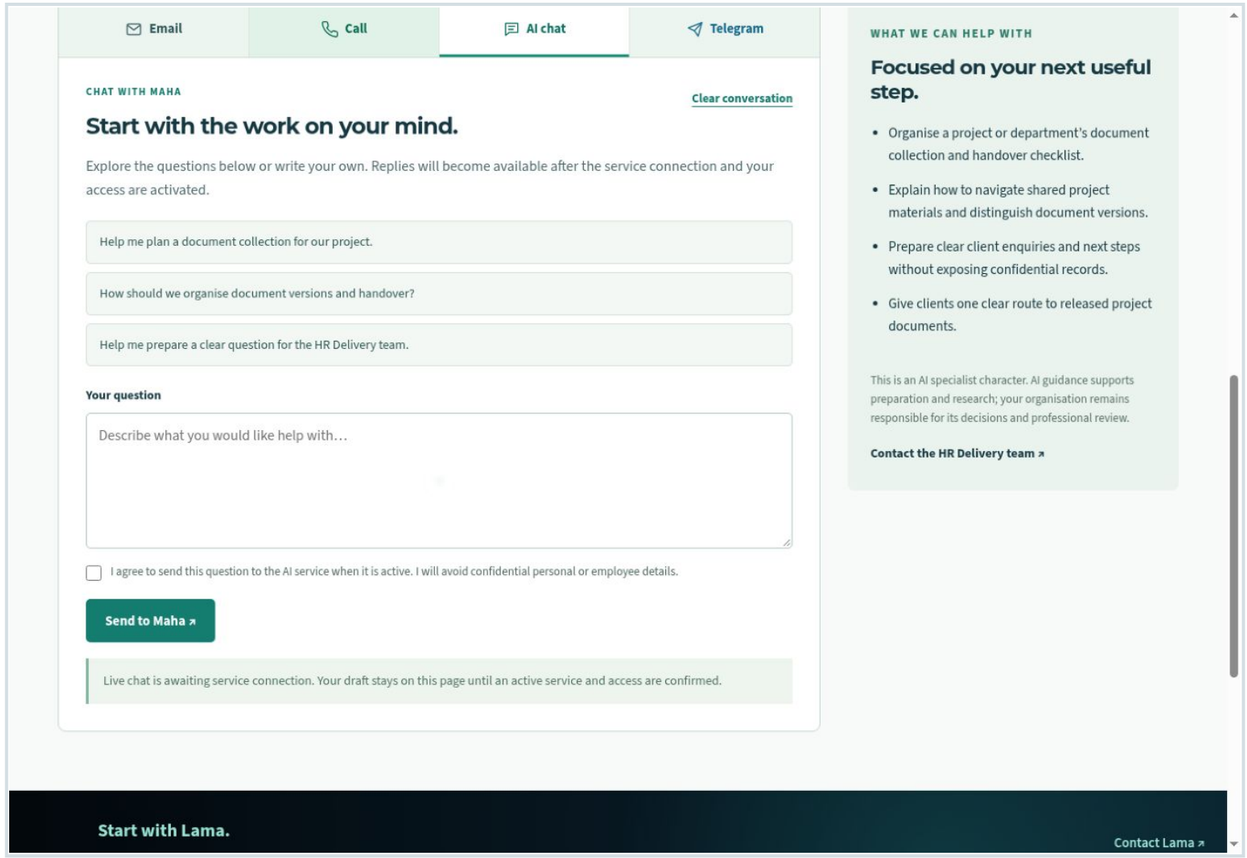
CHECK Checkpoint: the current draft is retained for the intended next action.

04 Review Communication Suite and Connections

Check the active channel and connection status before using any sending, calling, chat, Telegram or external-calendar function.

CHECK Checkpoint: the channel's operational status is known.

CURRENT LIVE SCREEN



Maha's public communication panel for context; private email-draft and connection-administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–5 OF 5

OPEN SOURCE

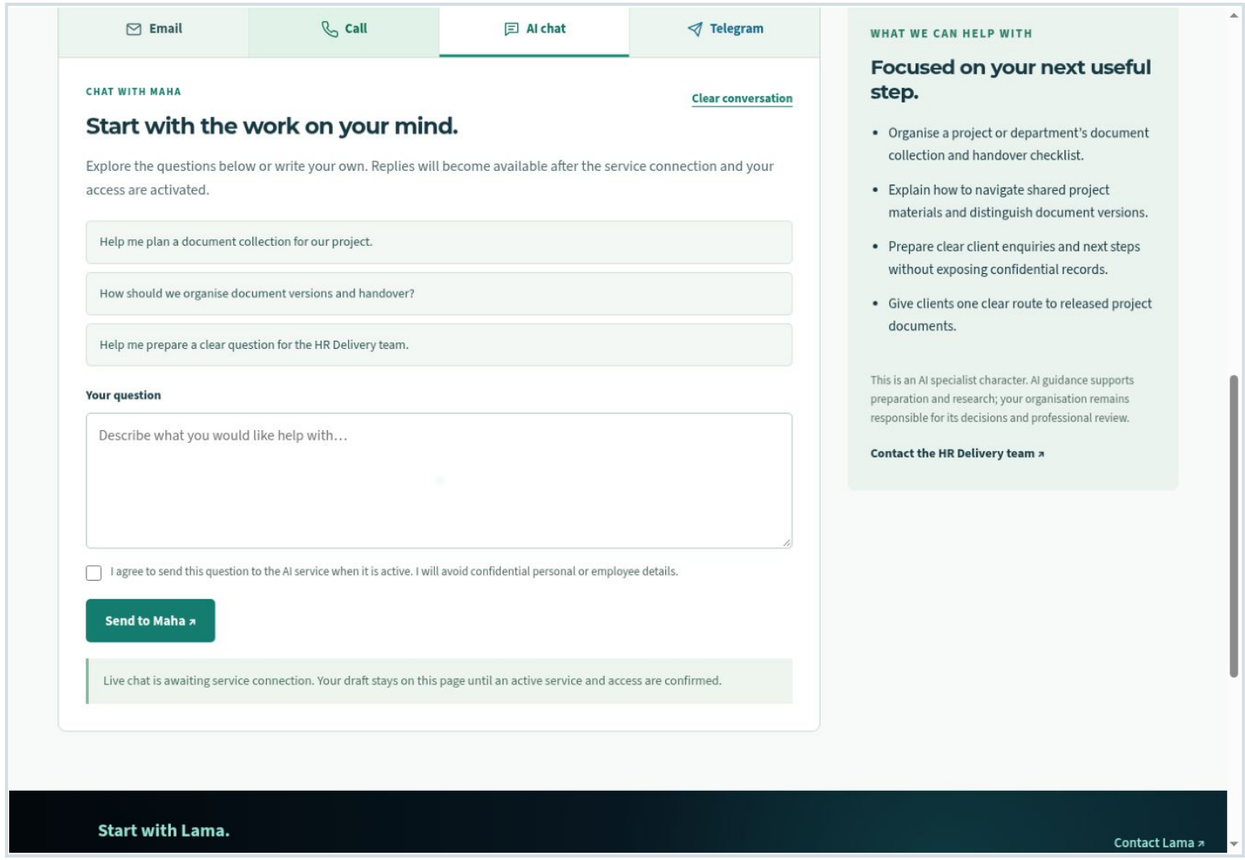
Prepare saved email drafts and check service connections

05 Use an approved active delivery route

Follow the organisation’s review and delivery procedure when a channel is active. Verify the actual response or delivery record rather than assuming success from a saved draft.

CHECK Checkpoint: preparation and delivery states remain explicit.

CURRENT LIVE SCREEN



Maha’s public communication panel for context; private email-draft and connection-administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / L-05-07

OPEN SOURCE

Coordinate mailing-list and newsletter administration

Maintain the intended audience and prepare content through the authorised process.

WHO USES THIS Authorised newsletter administrator

BEFORE YOU BEGIN

- Approved newsletter purpose
- Permitted subscriber data
- Publication and delivery authority

WHAT YOU WILL HAVE

- Reviewed newsletter draft and audience context

CHECK BEFORE YOU FINISH

- Country and language preferences honoured
- Approved edition and links checked
- Outbound connection verified

The screen does not match this guide. Check the country, selected module and account role. Ask Lama to confirm the correct route before continuing.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private subscriber administration was not entered. Signup/storage exists; outbound newsletter delivery requires configuration.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 1–2 OF 5

OPEN SOURCE

Coordinate mailing-list and newsletter administration

01 Open 'Mailing lists & newsletters'

Use the authorised staff workspace. Identify the intended publication, subscriber list and draft edition.

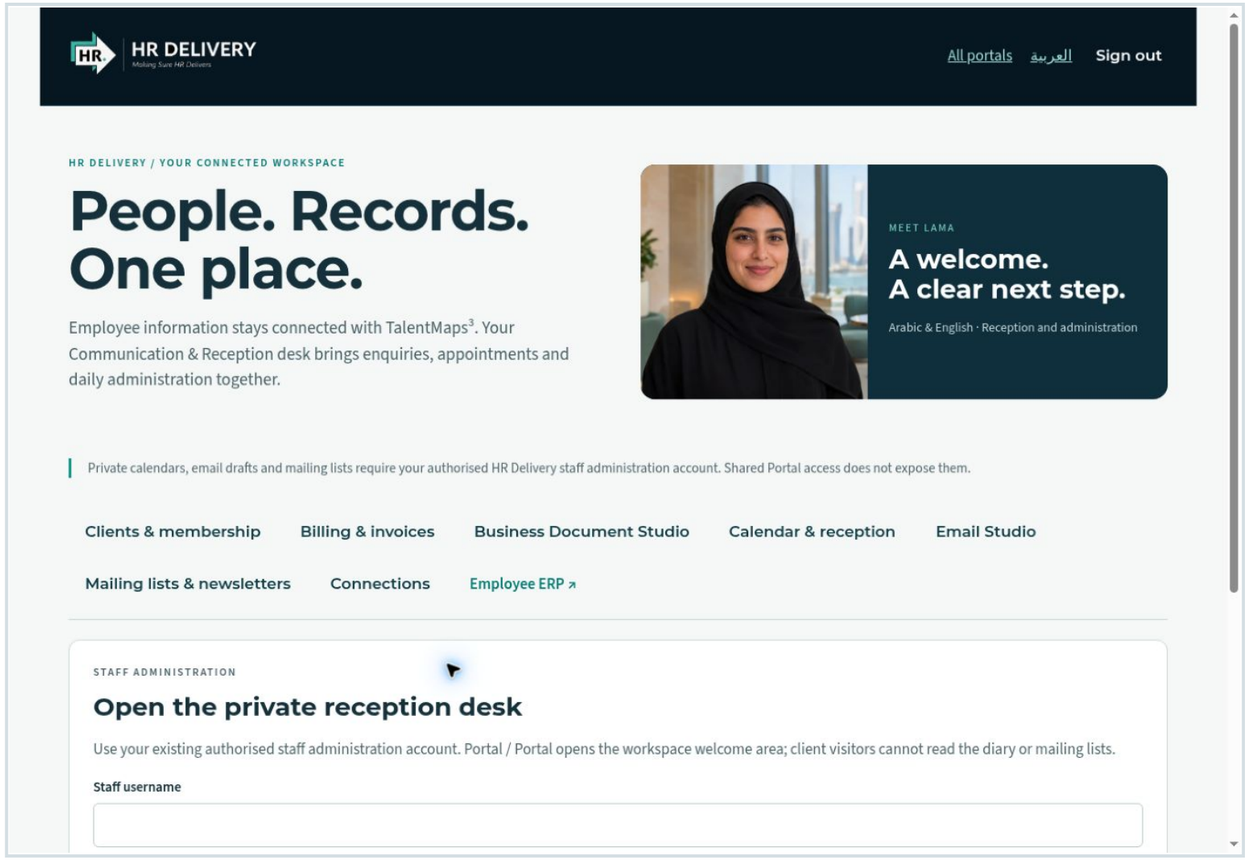
CHECK Checkpoint: the correct audience and edition are selected.

02 Review subscriber preferences

Respect the stated country and language interests and the consent record used for signup. Correct a mismatch through the authorised administration process.

CHECK Checkpoint: the intended audience reflects recorded preferences.

PRIOR REVIEWED SCREEN



Earlier Connected Workspace welcome and desk choices; private administration controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 3–4 OF 5

OPEN SOURCE

Coordinate mailing-list and newsletter administration

03 Prepare or review the draft

Check the edition, date, countries covered, source links, language files and explanatory context. Coordinate the HR Law content with the relevant reviewer.

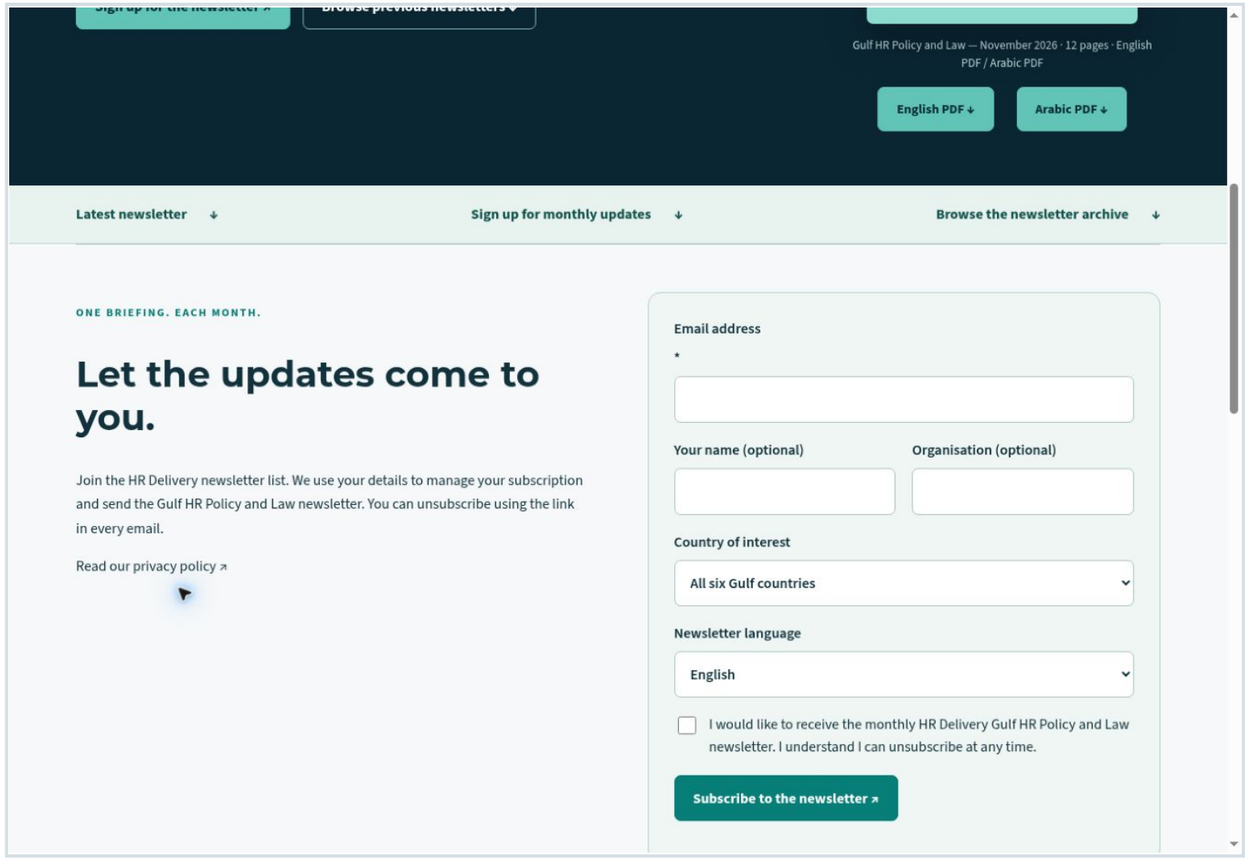
CHECK Checkpoint: the content is complete enough for publication review.

04 Confirm approval and the delivery connection

Newsletter signup and storage are separate from outbound delivery. Check the configured sending service and approval before arranging distribution.

CHECK Checkpoint: the draft is approved and the delivery route is actually available.

CURRENT LIVE SCREEN



Public signup for subscriber-input context; private mailing-list and sending controls are not shown.

AUTHORISED STAFF: BUSINESS DOCUMENTS AND COMMUNICATION / STEPS 5–5 OF 5

OPEN SOURCE

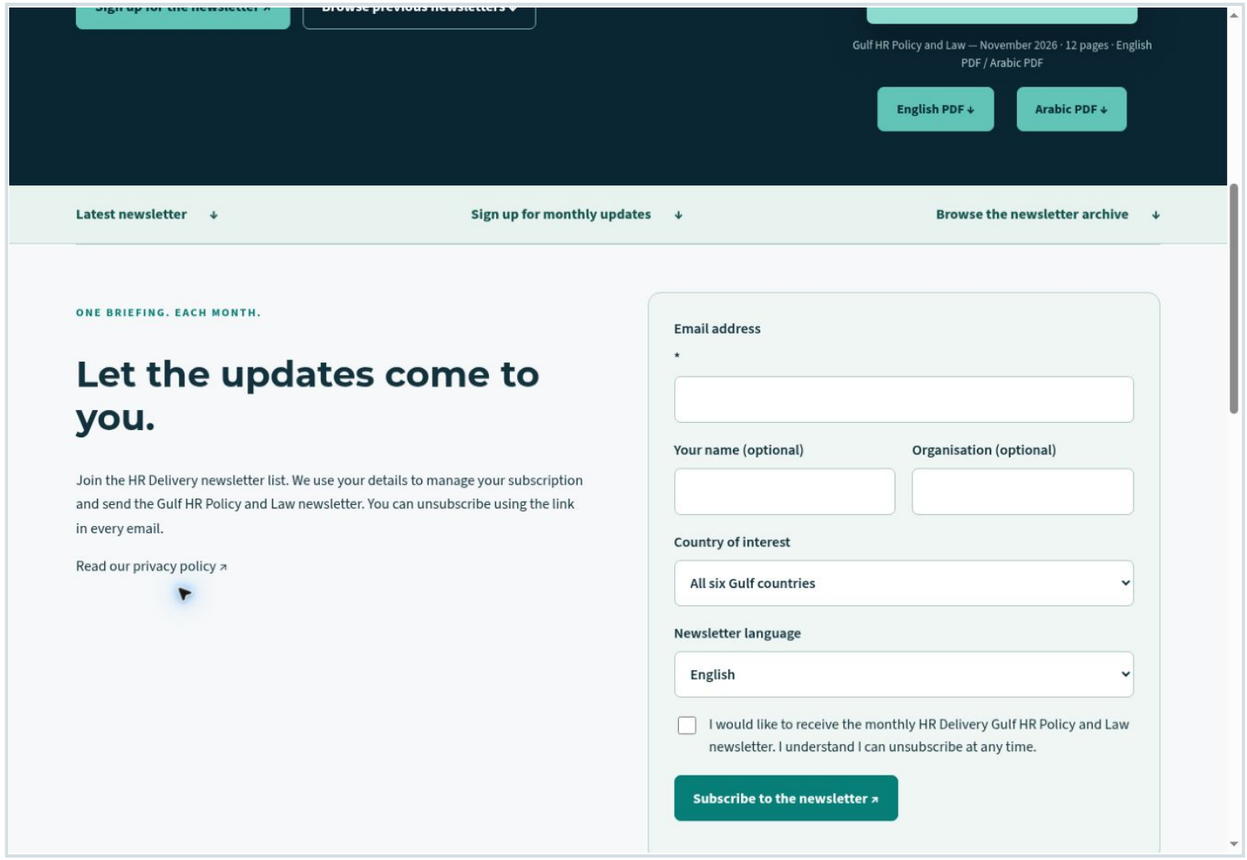
Coordinate mailing-list and newsletter administration

05 Retain the publication context

Keep the approved edition, archive reference and any verified delivery record together. Use Guide H for the public newsletter reading and signup procedure.

CHECK Checkpoint: the published issue and its administration can be traced.

CURRENT LIVE SCREEN



Public signup for subscriber-input context; private mailing-list and sending controls are not shown.

REFERENCE / 1 OF 1

OPEN SOURCE

Access routes and their purposes

Route	Use it for	Access context
Client collection	Released project documents and versions	Department welcome, then issued client reference and collection code
Staff Document Portal	Preparation, private storage, versions and release	Authorised staff account
Connected Workspace	Customers, billing, reception, business documents and drafts	Authorised staff desk; function-specific responsibility
Specialist communication	Maha or Lama service interfaces	Separate service access and active provider connection

REFERENCE / 1 OF 2

OPEN SOURCE

Business-document template selector

Template	Use when	Check before issue
Editable presentation starter	Explaining a proposal, project or finding	Audience, narrative, sources and readable charts
Client proposal	Recommending a solution and delivery approach	Client need, scope, outcomes and approved terms
Quotation	Providing a priced offer	Currency, amounts, validity and commercial approval
Business letter	Communicating a formal administrative message	Recipient, facts, authority and next action
Customer welcome/access handover	Starting the agreed service	Correct portal, support route and secure separate credentials
Statement of work	Defining the assignment	Deliverables, timetable, responsibilities and dependencies
Meeting agenda	Preparing a discussion	Purpose, participants, decisions and time
Meeting record/action log	Recording agreed decisions and actions	Owner, due date, status and factual accuracy
Client progress report	Reviewing delivery against the plan	Completed work, current issues and decisions needed

REFERENCE / 2 OF 2

OPEN SOURCE

Business-document template selector

Template	Use when	Check before issue
Membership renewal	Confirming the renewal next step	Dates, approved fee basis and service scope
Document-delivery handover	Introducing released deliverables	Project, document title, version and usage instructions

REFERENCE / 1 OF 1

OPEN SOURCE

A complete client handover

Item	What to include
Project	Agreed assignment name and responsible contact
Document	Full title, type and purpose
Edition	Version and release date
Use	What the client should read, decide or complete
Access	Correct collection route; credentials handled separately
Next step	Action, owner, date and support route

REFERENCE / 1 OF 1

OPEN SOURCE

Common questions and the next useful check

Situation	Check first	Then contact
Collection will not open	Separate client reference and code, not the department credential	Lama or the access administrator
Expected file missing	Project filter and release timing	Project delivery contact
Wrong or old edition	Title, latest version and date	Document owner
Appointment time unclear	Qatar UTC+03:00 and staff confirmation	Reception
No AI reply or automated email	Connection notice and active service route	Human HR Delivery contact

QUICK REFERENCE

Your final check

- [ ] **01** The client, project and document title are correct.
- [ ] **02** The edition and release date are clear before a file is used.
- [ ] **03** Private access codes are kept out of routine screenshots and messages.
- [ ] **04** A staff preparation or saved draft is not mistaken for a released or sent item.
- [ ] **05** Appointment requests remain provisional until staff confirmation.
- [ ] **06** Any invoice or newsletter work is separated from the status of its external delivery or payment connection.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Start with Lama when you need the right workspace, an explanation of a screen or a coordinated discussion with HR Delivery. Describe the task you are trying to complete and the point at which you need help. The human team can confirm access, service scope and the next practical step.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Organisation and country
- Portal and task name
- Screen label or error wording
- Desired outcome and timing; never send passwords

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- The private client collection was not entered; its illustrated interface is HR Delivery’s published synthetic demonstration.
- The Staff Document Portal and Connected Workspace private desks were not entered. Their chapters are process guidance based on the service inventory, not a verified sequence of every private control.
- No file was uploaded, released, hidden or downloaded from a real client collection; no access code or entitlement was changed.
- No appointment, message, invoice, payment record or newsletter was submitted.
- External AI communication, automatic appointment emails, calendar synchronisation, recurring payment collection and newsletter delivery should be treated according to their actual connection status.

Screen key: Current live screen | Published demonstration | Prior reviewed screen