

# Customer handbook

Accounts, pursuits, workforce, evidence and everyday administration.

Public customer edition | Version 1.2 | 29 September 2026

Winrove by IT Custom Solution

This handbook is organized by task. Use the contents to find a procedure, then check its access requirements, save behavior and expected result.

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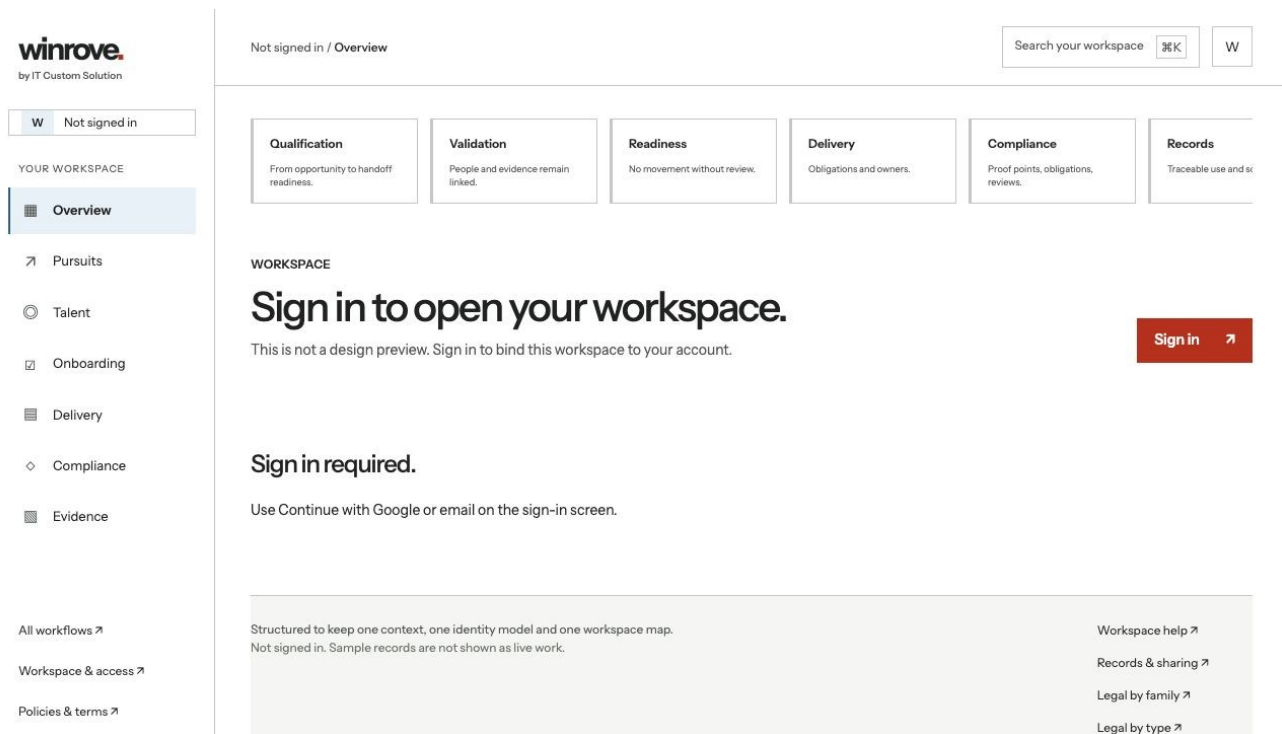
## Winrove by IT Custom Solution

Use this manual to open the right workspace, complete supported tasks, inspect your records and recover when an operation cannot be confirmed. Start at [Winrove workspace](#).

This handbook includes verified email-and-password sign-in with an existing authenticator challenge and selected signed-in reading checks on 29 September 2026. Other instructions were checked against the software and are not a claim of successful execution. Availability depends on your organization, permissions and connected services. Use the controls and availability messages shown in your own account.

IT Custom Solution is the parent company; Winrove is its software platform. For current availability, see [Plans & availability](#). For help with a task, visit [Winrove help](#).

## 1. Find your work and understand access



Signed-out workspace entry captured 27 September 2026. Signed-in verification completed 29 September 2026 is described in the chapter notes.

**Verification note:** Signed-in navigation was verified on 29 September 2026. Contracting, Hiring, Onboarding, Delivery, Compliance and Evidence workbenches displayed empty-state messages in the checked account; Skills & practice displayed a role-access denial. These results describe that account, not universal availability or missing records in every organization.

### Open the workspace

1. Open [Winrove workspace](#).

2. Sign in if the page asks you to.
3. Check the displayed account before opening records.
4. Use your workspace summary or navigation to select the appropriate area.
5. Open a list, then choose a record you are permitted to see.

The workspace summarizes available pursuits, proposals, contracts, notifications and next actions. A queue failure can show **Workspace queue unavailable** with **Open the capture pipeline** as another route. An unavailable summary does not establish that its underlying records have disappeared.

Screen links in this manual open an application view. Some detail views require you to select a record from a list first. A record reference copied from a different organization will not grant access.

### Choose a task area

| Your task                             | Starting area                                      | Access to confirm                                             |
|---------------------------------------|----------------------------------------------------|---------------------------------------------------------------|
| Find and pursue opportunities         | Opportunity explorer, Capture pipeline             | Organization contracting access and permission for the record |
| Review proposal material              | Proposal library, Writing workbench                | Access to the proposal or its pursuit                         |
| Manage equipment or licenses          | Asset and license register                         | Organization workplace access and write permission            |
| Review practice or assessment history | Career World, Assessment result, Student workspace | Your personal learning identity and connected records         |
| Review candidates or invite someone   | Candidate directory, Recruiter setup               | Hiring authority and the linked hiring account                |
| Follow joining or leaving work        | Journey register or My joining journey             | Workforce tenant membership or personal recipient access      |
| Inspect documents or signatures       | Document vault, My documents, My signature         | Permission for that document or invitation                    |
| Request a capability                  | Sectors or purchase/access request                 | Current organization and authority to request access          |

| Your task              | Starting area     | Access to confirm                                                     |
|------------------------|-------------------|-----------------------------------------------------------------------|
| Set up company sign-in | SSO and directory | Owner or organization administrator, recent sign-in and authenticator |

## Understand why a record is unavailable

Winrove checks several different things. Being signed in establishes identity. Organization membership establishes where you belong. Capability access determines which operations are enabled. Record permissions determine what you can read or change. Some records also require a separately verified account connection.

A matching email address does not link two accounts or prove ownership. Joining an organization does not automatically make you its administrator. Access to a candidate does not grant access to that person's private learning history.

For some workforce views, choose a tenant from **Choose a tenant**. Check the displayed role before continuing. A directory marked as scoped to your role may contain only part of the organization's people or records.

## Read Today without treating it as a permission switch

Open **Today and approvals**. Review **My actions**, **Approvals** and **Recent changes** as available. The page arranges work according to roles returned by the service, including capture, proposal, pricing, contributor, reviewer and external-partner roles. It does not grant a role by changing the view. Opening an item triggers the record's own access checks.

An item appearing in an approvals view does not prove you may approve it. Read the actual record and available actions.

## Recognize read-only screens

Many views explain the work but display existing records only. For example, Proposal editor shows stored content and versions; its name does not establish that text editing is connected. My task shows journey state but does not submit forms or upload files in this edition.

If the page says an action is not connected, stop that action there. You can still read the available records or contact the responsible organization administrator. Do not use a similarly named screen as an assumed substitute.

## 2. Sign in, create an account and recover access

**Verification note:** Normal email-and-password sign-in followed by an existing time-based authenticator challenge was completed on 29 September 2026. Registration, Google sign-in, company SSO, recovery-email delivery, new authenticator enrollment and session revocation were not tested for this edition.

### Sign in with email and password

1. Open **Sign in**.
2. Enter **Email address** and **Password** for the account you intend to use.
3. Complete the displayed security check.
4. Select **Sign in**.
5. Complete any authenticator challenge.
6. Check the account and continue to the workspace.

The submit control can remain disabled while a required security check or session check is incomplete. Do not repeatedly submit while the page says **Working...** or **Checking your session....**

If the email or password is refused, check the intended account and keyboard entry. Use **Help with access** when needed. If the page cannot confirm the session, retry sign-in through the displayed flow; do not assume you are authenticated because the page changed.

### Continue with Google

1. Open Sign in.
2. Select **Continue with Google** when enabled.
3. Complete the official provider flow using the intended account.
4. Check the account shown after returning.

The application can report that Google sign-in is disabled or cannot currently be checked. **Check again** retries the provider availability check. Use another method only if it belongs to the account you intend to access; a different provider can represent a different identity.

### Use company SSO

1. On Sign in, enter **Work email for company sign-in**.
2. Complete the security check.
3. Select **Sign in with company SSO**.
4. Complete your organization's identity-provider flow.
5. Confirm the organization and account after returning.

Company sign-in opens an organization-managed account. It does not attach itself to an existing email-and-password account merely because the email matches. If no provider is configured for the domain, use the intended account's supported method or ask your administrator.

## Create an account

1. Open **Create account**.
2. Enter **Full name**, **Email address** and **Password**.
3. Use at least 10 characters for the new password.
4. Read the current terms and legal notice.
5. Complete the security check and select **Create account**.
6. Follow the resulting instruction. If told to confirm by email, open the confirmation message and return to sign in.
7. Check which workspace or invitation is available to the new account.

Creating an identity does not automatically grant company membership, a subscription or capability access. Keep account creation separate from a workforce joining journey.

## Request a recovery link

1. Select **Help with access** from Sign in.
2. Enter the account's **Email address**.
3. Complete the required security check.
4. Select **Send recovery link**.
5. Follow the supported recovery message and link.

The page deliberately says, "If that address has an account, a recovery link is on its way." That message does not disclose whether an account exists and is not proof the email arrived. If delivery is missing, check the intended mailbox and use support without sharing a password or recovery code.

## Set a new password in recovery

When the recovery flow provides the signed-in password form:

1. Enter **New password**.
2. Repeat it in **Confirm new password**.
3. Use at least 10 characters and make both entries identical.
4. Select **Update password**.
5. Check for **Your password has been updated**.

A password appearing in a known breach is refused. Choose a different one. If your session changes while the operation is pending, review the current account before trying again.

## Set up or verify an authenticator

1. Open the application's authenticator step when prompted.
2. If no verified authenticator is available, use **Set up authenticator**.
3. Follow the displayed enrollment instructions in your authenticator application.
4. Enter **Authenticator code**.
5. Select **Enable two-factor** to finish enrollment, or **Verify authenticator** for an existing factor.
6. Return to the task that requested verification and review it again.

A pending enrollment can be invalidated by an account/session change. **Set up a new authenticator** is available only in applicable states. Keep the setup image, seed and codes private. A photograph or screenshot of the setup secret can let someone reproduce the factor.

## Sign out

Use **Sign out** to leave the current account. The logout flow also exposes **Sign out of all devices**. Wait for the confirmed result before treating other sessions as revoked. If sign-out fails, use **Retry sign-out**.

The **Security and sessions** workspace mostly reads device records in this edition; its tab names should not be confused with the separate working authentication flow.

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## 3. Search opportunities and manage pursuits

**Verification note:** Signed-in pursuit case-file reads were verified on 29 September 2026: one stored source, three requirements and two recorded no-go decisions were displayed. Team reported that it was not connected, Milestones reported an unverified actor, and Outcome was empty. Search, intake, stage changes and qualification writes remain checked against the software; successful writes and recovery paths were not exercised.

## Search opportunities

1. Open **Opportunity explorer**.
2. Select **Filters**.
3. Enter the criteria you need.
4. Select **Search opportunities**.
5. Review returned results and open the relevant opportunity.

| Field     | Meaning                                      | Entry limit    |
|-----------|----------------------------------------------|----------------|
| Keywords  | Words describing the work                    | 120 characters |
| NAICS     | Industry classification to narrow the search | 10 characters  |
| Set-aside | Applicable opportunity designation           | 80 characters  |
| State     | Two-character state abbreviation             | 2 characters   |

Search runs when you submit the form. A blank or failed search is not proof no opportunities exist. Review source coverage and availability before concluding that a source was searched.

On **Opportunity detail**, inspect Overview, Source, Amendments and Match explanation where data is returned. Confirm due dates and material solicitation terms at their authoritative source. Match information supports review; it is not a guaranteed award probability.

Inspect searches, watches and scan history

Open **Saved searches and watches** to inspect Searches, Saved opportunities and Watch preferences. Review criteria, alert frequency, active/paused state and last-run or last-check time. In this edition, this view does not save new searches, save opportunities or change watch settings.

Open **Scan control and history** to inspect Schedule, Runs, Results and Failures. Running a scan or reconfiguring its schedule is not connected on this screen. A stored schedule is not evidence a recent run succeeded.

Create a pursuit

**Before starting:** know which organization owns the work. Have a clear title, the relevant opportunity reference, response date if known and intended vertical pack. Use a controlled example when training.

1. Open **Capture pipeline**.
2. Select **Start a pursuit**.
3. Enter the intake fields below.
4. Select **\*\*Review > \*\***.
5. On **Create this pursuit**, check the title, pack, due date and reference.
6. Select **Back to edit** to correct anything, or **Create pursuit** to store it.
7. Check **Pursuit created** and its stored timestamp.
8. Select **Open the case file**. Return to the pipeline or reload to confirm the record is present.

| Field                                      | Meaning                                                       |
|--------------------------------------------|---------------------------------------------------------------|
| Pursuit title                              | Required name for this piece of work; up to 240 characters    |
| Opportunity or notice reference (optional) | The source reference you want to retain; up to 120 characters |
| Response due (optional)                    | The response date known at intake                             |
| Vertical pack                              | The offered workflow pack appropriate to the pursuit          |

The final confirmation stores a pursuit for the organization. Merely reaching Review does not create it.

**If the outcome is uncertain:** use **Open the capture pipeline** to check whether it exists. **Retry creating this pursuit** reuses the same request and is designed to avoid a second pursuit. Do not start another intake with a slightly different title to get past a timeout.

### Change a pursuit's stage

1. Open the pipeline or the intended case file.
2. In **Review stage change**, select **Pursuit** if the form asks for it.
3. Choose **New stage** from the offered values.
4. Select **\*\*Review stage change > \*\***.
5. Compare **Current stage** with **New stage** and check the pursuit name.
6. Select **Back** to stop, or **Confirm stage change** to continue.
7. Check **Stage change stored**, the resulting stage and stored timestamp.
8. Reload the pursuit before making a dependent decision.

Editable stages include Draft, Active, Review, Ready and Closed. A Submitted pursuit changes through its submission record; this stage control does not alter it.

**If blocked:** a recent sign-in and authenticator may be required. A conflict means another change occurred; use **Reload pursuit** and review the current state. If the page says the change was saved but not read back, reload before any further update. Do not confuse that state with a failed write.

### Review a pursuit case

Open the pursuit card and inspect the tabs relevant to your work:

| Tab           | What to check                                                                          |
|---------------|----------------------------------------------------------------------------------------|
| Brief         | Title, stage, pack, due date, opportunity reference, creation and last stored change   |
| Sources       | Recorded source material and its processing state                                      |
| Requirements  | Extracted requirements and review status                                               |
| Qualification | Current qualification and its decision record                                          |
| Team          | Read the current availability notice; assignment information may not be connected here |
| Milestones    | Dates or milestone records returned by the service                                     |
| Outcome       | Submission date, outcome/reason and remaining submission blockers                      |

If no record is selected, choose a pursuit from the list. Do not treat an empty selected-record page as evidence the pursuit was deleted.

### Record a qualification decision

1. Open the case file's **Qualification** tab.
2. Read the current decision and supporting information.
3. Choose **Decision** from the offered values.
4. Enter a required **Reason**, up to 600 characters.
5. Select the displayed qualification-review control, normally **\*\*Review qualification decision > \*\***.
6. Check Decision, Reason and **Will be recorded as** version on the review panel.
7. Use **Back to edit** if needed, or **Confirm decision**.
8. Check **Decision recorded**, its version and timestamp. If readback failed, reload qualification.

This records a decision visible to people in your organization who can open the pursuit. Earlier decisions remain. Qualification does not itself change the pipeline's award/loss counts.

**Recovery:** use **Reload qualification** after conflict or supersession. If an uncertain response is followed by a stored decision matching your decision, reason and expected version, no retry is needed. Otherwise the offered **Retry recording this decision** reuses the request. A fresh-authentication failure asks for a sign-in within the last 15 minutes and any required authenticator code.

## Interpret pipeline results

Under **Award and loss**, compare Submitted, Won, Lost, No-bid decisions and the displayed win rate. No-bid decisions are counted apart from losses. Win rate is based on won divided by won plus lost. No results yet is different from zero wins in a completed sample.

The pipeline's Owners view does not invent an individual owner where the stored record only identifies an organization.

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## 4. Read proposals, requirements and commercial records

**Verification note:** Selected signed-in case-file inspection was verified on 29 September 2026, including Sources, Requirements and Qualification. Other stored-record views remain checked against the software. This chapter does not claim unavailable authoring, submission or export operations work.

### Check source processing and requirement traceability

1. Open the relevant pursuit.
2. Open **Source revision workbench**.
3. Review recorded revisions and OCR/processing status.
4. Open **Requirements workbench**.
5. Compare Matrix, Accepted and Rejected lists.
6. Inspect Source linkage and locator validity for important requirements.

The source workbench does not provide a complete text diff merely because Revision comparison is a tab. Requirements can remain withheld until every latest source revision has finished processing. A recorded locator and a verified locator are different states.

### Check readiness

1. Open **Submission readiness** for the intended pursuit.
2. Read Blockers before assuming the pursuit is ready.
3. Inspect returned Overrides and Reviewer information.
4. Read Submission receipt only as a record of an actual recorded submission.

A readiness state is not proof an external recipient accepted a submission. This edition does not prescribe an override or submission click from the tab names alone.

### Inspect a proposal and an earlier version

1. Open **Proposal library**.
2. Choose a proposal from the relevant available list.
3. On **Proposal editor**, use **Sections** to read stored content and its record facts.

4. Select **Comments** to read existing comments.
5. Select **Versions**, then **Open** beside the version you need.
6. Compare the displayed version number, time and stored content.

The current view does not edit text or post comments. Assignments does not reveal names where no member directory is available. The proposal service records draft and submitted outcomes; an In review tab is not evidence of a distinct supported status.

### Inspect writing and human review

1. Open **Writing workbench** from the selected pursuit.
2. Under **Requirement**, review accepted requirements.
3. Under **Evidence**, inspect the section's recorded claim/evidence information.
4. Under **Draft**, read existing section content and version/state.
5. Under **Human review**, inspect the current review and submit-gate information.

**No active proposal workspace** means there is no active writing workspace for this pursuit. This screen does not activate one. Draft content may be abbreviated in the display. A generation-job view requires an existing job reference; this manual does not treat that screen as a generation button.

### Read document changes and reusable material

**Document round trip > Tracked changes** shows the stored change queue. Importing a document, connecting SharePoint mappings and producing export receipts are not connected here. A note about those operations is not a receipt.

**Reusable document library** reads documents available to the signed-in user. Do not assume organization sharing or complete version history where those are not returned. **Past performance library** shows stored records and their own verification status; personnel and per-record source detail are not fully exposed by that read.

### Review SF330 information

1. Open **SF330 workbench**.
2. Review **Personnel** and **Projects** for the source records incorporated into the form.
3. Use **Sections** to identify populated and empty sections.
4. Read **Validation**, including missing fields and advisories.
5. Resolve source-record problems through the responsible supported workflow.

The current **Official PDF** tab does not export a PDF. The completeness report concerns stored form content and is not an attestation that every fact is correct. Updating personnel happens in the appropriate profile workflow, not this read-only form view.

**Capability statement** similarly reads company facts and evidence. Generating its preview is a separately authorized action and is not connected here.

## Read pricing and reports

| Screen                      | Reading task                                                         |
|-----------------------------|----------------------------------------------------------------------|
| Estimate workbench          | Review lines, formulas, validation messages and the stored version   |
| Rate evidence               | Compare observations, selections and source references               |
| BOE and scenarios           | Review assumptions, alternatives and comparison information          |
| Pricing approval and export | Inspect recorded waivers, approvals and any actual receipt           |
| Reports and definitions     | Read outcomes, pricing, source-quality metrics and their definitions |

An Export receipt heading does not mean the page can generate a new export. Reported outcomes awaiting verification remain unverified.

## Search award and spending intelligence

1. Open **Intelligence explorer**.
2. For **Awards**, enter the relevant Keywords, NAICS, Agency or Fiscal year and select **Search awards**.
3. For **Spending**, enter Agency or NAICS, optionally Years, then select **Show spending**.
4. Review results and their source/freshness information.
5. Inspect Signals or an authorized Agency/Vehicle record where available.

Spending requires an agency or NAICS criterion. A detail record may require its record reference. Some lists disclose that additional rows exist beyond the current page without exposing paging; do not treat those displayed rows as a full inventory.

**Network directory** lists contractor, partner and vehicle profiles. **Relationship workspace** reads profile, reviews and access eligibility. Creating an access request or engagement is not connected merely because its tab is present.

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## 5. Use the command bar

**Verification note:** supported grammar, previews and undo behavior are checked against the software; no command was executed for this manual.

### Run a supported action

1. While signed in, press **Ctrl+K** on Windows/Linux or **Command+K** on macOS.
2. Enter the action with enough of each record's name to identify it.

3. Read the one-line preview carefully.
4. Resolve any ambiguous-name message by using more of the name.
5. Press Enter only when the preview matches your intent.
6. Read the result and reopen the affected record to confirm its state.

Fictional training examples:

- move Training Example to review
- assign section L of Training Example to Dana as reviewer
- start a pursuit for Training Opportunity

The supported families are stage change, section assignment and starting a pursuit from a saved opportunity. Assignment roles offered by this interface are owner, reviewer and contributor. The signed-in person's usual role, entitlement and recent-authentication checks still apply.

### Undo a stage change

If a successful stage change presents **Undo**, it is available for 60 seconds in the same session. Read the proposed return stage and use Undo within that window if appropriate. Reopen the pursuit afterward.

Undo makes a new change that returns the stage. It does not erase the original event and does not provide universal rollback. If the record changed again, follow the conflict message rather than forcing an earlier state.

### Recognize unsupported commands

The command bar does not submit pursuits, delete records, remove assignments or mark untracked tasks/deadlines complete. Submitted pursuits cannot change stage through it. An unsupported-command explanation is the intended stopping point. Use the actual record workflow if a supported alternative exists.

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## 6. Manage assets, licenses, vendors and imports

**Verification note:** Signed-in reading of an existing asset register was verified on 29 September 2026. Registration fields were displayed; no registration, import or asset update was submitted. Review, confirmation and recovery procedures remain checked against the software.

### Register an asset

1. Open **Asset and license register > Assets**.
2. Find **Register a new asset**.
3. Complete the fields relevant to the item.
4. Select **\*\*Review registration > \*\***.

5. Check the reviewed values and organization scope.
6. Select **Back** to correct them, or **Confirm**.
7. Check **Change stored**, then **Continue**.
8. Reload the register and open the new record to verify the values.

| Field                | What to enter                                                         |
|----------------------|-----------------------------------------------------------------------|
| Name                 | A recognizable item name; required, up to 200 characters              |
| Type                 | The asset category offered by the form                                |
| Serial               | Manufacturer or inventory serial, if applicable; up to 120 characters |
| Vendor               | Supplier name where known                                             |
| Location             | Recorded physical or organizational location                          |
| Purchase date        | Actual recorded purchase date                                         |
| Purchase cost (USD)  | Purchase amount in dollars                                            |
| Warranty expires     | Warranty end date                                                     |
| Useful life (months) | Useful-life assumption used for depreciation; 1-600 months            |
| License seats        | Purchased seat count for a license-type asset                         |
| Renewal date         | License renewal date                                                  |
| License cost (USD)   | Recorded license cost in dollars                                      |

New records enter the lifecycle as **ordered**. Registration does not establish delivery or assignment. License fields apply to license-type records; keep unknown values empty rather than inventing them.

### Edit details

1. Open the asset from the register.
2. Use **Edit details**.
3. Change only the intended fields.
4. Select **\*\*Review changes > \*\***.
5. Read the reviewed values and **Confirm**.
6. Reload the record and check the updated details.

The review warns that the change affects everyone in the organization who can open the record. An unconfirmed review has not completed that change.

## Change lifecycle state

1. Open the asset.
2. Under **Change lifecycle state**, choose **New state** from the offered targets.
3. Select **\*\*Review state change > \*\***.
4. Check the record and destination state, then **Confirm**.
5. Reload to verify the stored state.

Only permitted transitions are offered. If a transition is refused, reload the current state; another user may have changed it or the transition may be invalid.

## Assign an asset or allocate a license seat

For an asset, open its detail, choose **Assignee**, select **\*\*Review assignment > \*\***, review and **Confirm**. Reopen the record to verify the assignment.

For a license, choose **Member**, select **\*\*Review seat allocation > \*\***, review and **Confirm**. Check the resulting allocation. **That seat is already allocated** means the member already holds a seat and no new allocation occurred. Choose members from the organization list; typing or substituting an outside identity does not grant membership.

## Link a ticket

1. Open the asset and find **Link a ticket**.
2. Enter **Title** and choose **Priority**: normal, low, high or urgent.
3. Select **\*\*Review ticket link > \*\***.
4. Review and **Confirm**.
5. Check the linked ticket and asset after reload.

## Create a maintenance schedule

1. Open the asset's schedule form, or **Maintenance** in the register.
2. Select **Asset** when the form is not already scoped to one.
3. Enter **Schedule title** or **Title**.
4. Enter **Interval (days)**, from 1 to 3,650.
5. Set **First due**.
6. Select **\*\*Review schedule > \*\***, inspect the details and **Confirm**.
7. Reopen Maintenance and check the schedule's next-due and active state.

A saved schedule is not proof that a maintenance run happened. Inspect run history separately.

## Register or update a vendor

1. Open **Vendors**.
2. Use **Register a vendor**, or open the available editor for an existing vendor.
3. Enter **Name** and optional Contact, Email, Phone, Website and Notes.
4. Select **\*\*Review vendor > \*\*** or **\*\*Review vendor update > \*\***.
5. Check the reviewed values and **Confirm**.
6. Reload Vendors and inspect the stored record.

Name is required and limited to 200 characters. Notes allow up to 2,000. Recording an email or phone number does not itself contact the vendor.

## Import a CSV register

**Before starting:** keep the original export, verify that it belongs to the intended organization and check that importing it is appropriate. A preview may contain updates as well as new records.

1. Open **Imports**.
2. Under **Stage a CSV import**, enter **File name** if useful.
3. Paste the CSV into **CSV**.
4. Select **\*\*Preview import > \*\***.
5. Review detected format, row count, creates, updates, errors and unmapped columns.
6. Inspect row-level Action, Name and Notes.
7. Select **Discard** to abandon the preview, or **Commit import** to proceed through the displayed confirmation.
8. Read the result, then inspect **Import history**.
9. Verify the affected asset records and the created/updated/error counts.

The importer detects Snipe-IT, Intune-style, Jamf-style and Lansweeper-style exports and maps known headers. Other files need careful preview review. Unmapped columns are reported. Committing applies valid rows; an error count does not necessarily mean the entire batch was rejected.

The preview can be staged as an import record before register changes are committed. Do not interpret “nothing written until confirmation” as a guarantee that no preview record exists.

## Recover from an asset or import problem

| Message/state                           | Action                                                                     |
|-----------------------------------------|----------------------------------------------------------------------------|
| Serial already registered               | Find the existing asset and check the serial before trying again           |
| Record changed after you opened it      | Reload and review the current record; the rejected update was not stored   |
| Screen record changed since review      | Reopen the intended asset and stage a fresh review                         |
| Invalid lifecycle move                  | Reload to see current state and permitted targets                          |
| Member outside organization             | Choose a member returned in the organization list                          |
| Import already committed                | Inspect history; do not recommit or create a duplicate batch to compensate |
| Saved, readback unavailable             | Reload before making another change                                        |
| Result uncertain or network interrupted | Check stored records and history before repeating the operation            |

**Depreciation** is a report based on recorded cost/useful-life data. Missing inputs limit what can be calculated. A record in that report is not a substitute for your organization's accounting review.

## 7. Review skills, learning and assessment records

**Verification note:** record-reading surfaces and current limits are checked against the software. This manual does not establish that an interactive practice or assessment session can be started from every listed screen.

### Review Career World history

1. Open **Career World home**.
2. Inspect Shift catalog, Progress or Resume as available.
3. Open a recorded shift briefing and review Incident, Constraints and Objectives.
4. Open the corresponding review to inspect recorded rubric, method and evidence.
5. Use Career map and profile to read recorded advancement information.

Career World is a practice experience. Its state and scoring must remain distinct from a graded assessment. Terminal, topology, queue or coach tab names do not establish that interactive practice is available to your account.

### Review an assessment

1. Open **Assessment setup** to inspect available Track and Scenario records.
2. Choose an existing authorized assessment/session where the application provides one.
3. Read the recorded brief/transcript/status.
4. Open **Assessment result** to inspect grade status, rubric and debrief.
5. Distinguish a pending grade, a completed outcome and a recorded failure.

In this edition, the assessment workspace explicitly reads recorded sessions; its interactive terminal and submit action are not connected there. Setup does not decide eligibility or consent or start a session. Retaking an assessment is not connected on the result screen.

### Review learning and practice records

Learning library, Lesson and briefing, Scenario library and Scenario workbench let you inspect the records made available to your account. Review the scenario's problem/environment and recorded instructions. A catalog entry is not proof you can launch the scenario.

Practice lobby, Rush session and Gauntlet session describe or read recorded modes/runs. Progress and rankings reads available score/XP information. Streak, leaderboard, sharing or privacy information may be unavailable where no such record is stored; a blank tab is not an opt-in setting.

### Review education records

Education home and Class workspace can expose permitted schools, classes, rosters and progress. Student enrollment and Student workspace have age/guardian/consent/assignment/certificate areas, but this edition does not infer enrollment, consent collection or certificate issuance from their titles. Follow only an enabled, explicit action for your actual education organization.

Proof sharing and Public proof verification distinguish valid, revoked and unavailable proof. Do not treat another person's public proof as access to their private attempts. If sharing controls are not connected, this screen does not create a grant.

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## 8. Review hiring records and prepare invitations

**Verification note:** hiring reads and the invitation form are checked against the software. No invitation was sent or accepted for this manual. A candidate email can trigger a real message.

## Review candidates

1. Open **Candidate directory** with the appropriate hiring identity.
2. Use the available Search/Filters view and open a candidate record you may access.
3. Review Profile, Evidence, Decisions and Activity.
4. Use Candidate comparison where available to compare permitted evidence against the role criteria.
5. Record any decision only through an explicitly supported action with the required authority.

A score is an input to human review. Access to an invitation, profile or result does not establish unrestricted ownership of the person's data.

Candidate personal profile reads your own resume/private records. A resume link can expire after a few minutes. Reopen the supported view for a fresh authorized link if needed; do not publish it. Avatar, resume-upload and visibility changes are not implemented merely by displaying those tabs.

## Prepare a candidate invitation

**Before starting:** confirm the candidate and destination, whether you intend platform email or manual sharing, and whether the organization permits the invitation. Use designated test recipients for training.

1. Open **Recruiter setup > First invite**, or the available Candidate invitation panel.
2. To have the platform send the invitation, enter **Candidate email**. Leave it blank only when you intend to share the link yourself.
3. Select **Prepare invitation**.
4. Read the result carefully: **Invitation emailed** and **Invitation link ready** have different meanings.
5. Use **Copy link** while it is displayed.
6. If copying fails, select and copy the displayed link manually.
7. Store/share the link through your approved channel, then select **Done**.
8. Review the recorded invitation state separately; a prepared or emailed invitation is not an accepted invitation.

The link is shown once, normally lasts 72 hours and accepts one response. Do not include a real link in training screenshots or broadly shared notes.

## Recover an invitation

| State                        | What it means and what to do                                                                                          |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Address suppressed           | The email was not sent; read the displayed manual-sharing option                                                      |
| Email send failed            | A link may still exist; follow the manual-sharing instruction rather than assuming no invitation was recorded         |
| Existing live invitation     | Its old link cannot be shown again; use the existing copy or deliberately replace it                                  |
| Replace invitation           | <b>Revoke it and prepare a replacement</b> invalidates the old invitation and prepares a new one                      |
| Expired                      | Prepare a replacement through the supported flow                                                                      |
| Could not confirm            | Follow the displayed retry; unchanged details reuse the operation rather than deliberately sending another invitation |
| Hiring account not connected | Establish the required account connection through the supported access process                                        |

## Read jobs, templates and scheduling

Jobs workspace reads draft/published/closed records. Job editor, Role template editor, Sequence workspace, Interview scheduling, Recipient booking and Replay workspace have different record and authority requirements. Many editing, publishing, dispatch or booking actions remain unconnected in these views. Read the displayed limitation rather than treating a tab name as a working action.

Recruiter setup Company and Tracks read dashboard/analytics. Team does not add teammates through that view. Hiring analytics explains funnel counts; an Export tab is not proof of an export operation.

## 9. Follow workforce journeys and documents

**Verification note:** role-scoped workforce and recipient reads are checked against the software. Step completion, uploads, signing and guest access have not been tested for this manual; several of those writes are explicitly unavailable on the described screens.

### Open the correct workforce tenant

1. Open the relevant workforce area.

2. If asked, establish the required account connection.
3. Choose a tenant from **Choose a tenant**.
4. Confirm the listed role.
5. Open a permitted person, journey or document.

The list can be restricted to your role. It may not be the entire directory. Do not assume a lack of rows means the organization has no people or documents.

### Review people and journeys

1. Open **People directory** and find the permitted person.
2. Open **Person workspace**.
3. Inspect Employment, Journeys and Documents.
4. Open a journey from that person or **Journey register**.
5. Review ordered **Tasks, Owners, Readiness, Invitations** and **Activity**.

Tasks show ordered steps, required status and completion state. Readiness shows required steps complete, current step and target start where recorded. Invitations shows signature requests associated with the journey. Activity is reconstructed from stored timestamps; it is not necessarily an independent audit log.

Location cannot be supplied where the stored person record has no location field. Clearances and Access may have no dedicated read in Person workspace.

### Inspect templates and intake records

Template library reads joining/leaving/returning templates and recorded versions. Journey intake, Returning worker intake, Workforce import, Workflow template editor and Form designer do not establish working creation/import/publishing actions from their titles. Use their current availability messages. A workforce import is a different operation from the supported workplace asset CSV import in chapter 6.

### Inspect a document

1. Open **Workforce document vault**.
2. Select a permitted document.
3. Under **Preview**, check title, type, format, size and whether a file is stored.
4. Use **Provenance** to check upload time and linked person/journey.
5. Use **Access** to read scope and download permission.
6. Review **Retention** and **Legal hold** where applicable.

The current document view reads metadata. A “download permitted” result does not itself download the guarded file. Do not promise a download button or file content from that statement. Retention and legal-hold values are records to respect, not controls to bypass.

## Read signature state

Signature envelope shows recorded linked requests/status. The current application view does not show all consent text or a completion certificate. A recorded request is not a completed signature.

For **My signature**, use the legitimate invitation link you received. The view may show your journey and signature-step state. Actual consent and signing occur in the supported signing session; this read-only view does not sign. Do not manually copy tokens into documentation or reuse another recipient's link.

Acknowledging equipment or a document is distinct from applying an electronic signature. Use the exact action required by the actual journey.

## Follow your own joining work

My joining journey reads your steps, completion/readiness and current step. My task reads current journey state. In this edition it does not upload files, submit forms, complete training or record equipment acknowledgments. If no journey exists, contact your organization's onboarding contact.

My documents shows permitted documents, but does not reliably reconstruct “uploads you made” when uploader ownership is not stored. My conversation reads available messages and participants; it does not send replies or prove message delivery. My worker profile reads current account details without editing them here.

## Review workforce compliance or auditor records

Workforce compliance register shows permitted checks, clearances and due dates. A provider configuration gap means an automated check did not run; it is not a passing result. Compliance case shows recorded outcomes and limits of available evidence.

External review grants and External auditor workspace require the actual restricted authority. A staff account cannot serve as proof of an auditor's access. Do not assume an Export tab permits bulk extraction. Ask the grant owner about missing, expired or revoked access.

---

# 10. Review delivery, compliance and evidence

**Verification note:** reading views and additional restricted workflows were checked against the software. Availability and successful completion have not been established for every additional workflow and role in this edition.

## Inspect contract delivery

1. Open **Contract portfolio**.
2. Choose a permitted Active, Pending or Closed contract.
3. Inspect Contract workspace facts and available supporting records.

4. Open Deliverable and CDRL workspace to review requirements/submission/acceptance/history returned by the service.
5. Review Contract changes and Contract closeout where relevant.

Some document, funding and obligation information is not exposed through a particular contract read. A tab is not evidence that a full register is present. A submission record, acceptance record and closeout receipt are separate facts.

## Read an audit case

Open Compliance checker or Audit case workbench for the permitted record. Inspect source documents, requirements, analysis and recorded report. A displayed completion percentage is the service's calculation; read its denominator and missing items. This report view does not generate a new export.

## Understand the additional delivery and assurance workflows

Additional workspaces require specific capability access. Use only actions your organization has been admitted to use and that the screen actually enables. These families need distinct permissions and records:

| Family                   | Records and decisions it separates                                                                |
|--------------------------|---------------------------------------------------------------------------------------------------|
| Delivery                 | Award handoff, source-bound obligations, occurrences, work packages, deliverables and submissions |
| Receiving decisions      | Pending submissions, accepted/rejected/returned decisions and the authority to make them          |
| Amendments               | Proposed change, impact review, application and resulting readiness                               |
| Compliance programs      | Scope, control catalog, applicability, implementation and its review                              |
| Assessments and findings | Recorded objective results, submitted/final assessment, findings, remediation and verification    |
| Exceptions               | Explicit exception records and their own authority                                                |
| Evidence                 | References, purpose-specific permitted use, packages and sharing grants                           |
| Retention and reuse      | Legal holds, retention decisions and approved performance reuse                                   |

A package created is not a package published. A submission received is not accepted. A finding marked work-complete is not independently verified. A shared reference is not permission for every use.

Because activation and action forms were not verified for these protected workflows, this manual does not invent field-by-field write sequences. If one is enabled for your organization, review its record scope, proposed change, final confirmation and receipt, then reload the affected record. If the result is uncertain, use the displayed recovery operation instead of creating a second command.

### Inspect evidence and handoffs

Evidence index and Evidence workspace read permitted records and available provenance. Reviewed handoff and Handoff history may describe notifications emitted to your account. They do not necessarily track downstream acceptance, identity matching or completion by another service. A sent notice is not an accepted handoff.

---

## 11. Request capability access or a purchase review

**Verification note:** setup/request forms and result states are checked against the software. No access request, commercial request or activation was submitted for this manual.

### Choose a sector relationship

1. Open **Sectors** in the application.
2. Choose the sector relevant to the work.
3. Choose the relationship that describes your organization.
4. Read the capability's current availability and prerequisites.
5. Continue only through the access/request route offered for that capability.

| Relationship     | Meaning                                           |
|------------------|---------------------------------------------------|
| Institution      | Your organization operates services in the sector |
| Supplier         | Your organization sells into the sector           |
| Service provider | Your organization supports clients in the sector  |

Available configuration comes from the service. A public description or a relationship choice does not activate a workflow.

### Complete outcome-based setup

Where the application presents this setup:

1. Under **Your outcome**, confirm the intended outcome and **Continue**.
2. Under **Your organization**, enter Organization name and Organization type; add optional Jurisdiction.
3. Select **Continue**.
4. Under **Intended use**, select the supported uses that apply.
5. Read and acknowledge that restricted workloads need their own authority and this setup does not approve them.
6. Select **Continue**.
7. Under **Review and finish**, check the details and select **Finish setup**.
8. Review any separate activation request before choosing **Record activation**.

Setup completion is distinct from activation approval. Under review, Active, Declined and Revoked are different outcomes. Use the status view to confirm which one applies before opening the work destination.

## Submit a purchase or access-change request

1. Open **Purchase/access request**.
2. Confirm the current organization.
3. Enter the request fields.
4. Select **Review request**.
5. Check organization, request type, need, capability, quantity and reference.
6. Use **Edit details** to correct the request.
7. Select **Submit request for review** only when it is ready.
8. Read the recorded result and check the request in its status view.

| Field                       | Meaning                                                           |
|-----------------------------|-------------------------------------------------------------------|
| Request type                | Subscription, Procurement or Assisted services                    |
| What you need               | Short description, up to 2,000 characters                         |
| Capability requested        | Intended capability, up to 160 characters                         |
| Requested quantity or seats | Whole number from 1 to 100,000, where applicable                  |
| Your reference (optional)   | Your organization's internal reference, up to 200 characters      |
| Context (optional)          | Useful scope, timeline or routing context, up to 6,000 characters |

This records a request for review. It does not place an order, charge a card, accept an agreement or grant access.

## Recover a request

If the application cannot confirm the result, use **Check recorded requests** first. **Recover request** with unchanged details in the same session uses the same request reference. If the organization changed, select **Review current organization** and review again.

A receipt can exist while its source business record temporarily cannot be read. Use **Retry source read** rather than concluding the work was deleted. If work records fail to load, **Retry records** performs a read; it is not permission to submit duplicates.

---

## 12. Manage organization sign-in and inspect settings

**Verification note:** SSO controls and account/settings reads are checked against the software. DNS/provider configuration and actual SSO sign-in have not been executed for this manual. Several settings remain read-only.

### Set up company SSO

**Audience:** organization owner or organization administrator. You need authority to administer the domain and identity provider, a sign-in within the last 15 minutes and an authenticator-verified session.

1. Open **SSO and directory > SSO discovery**.
2. Read whether company sign-in is enabled in this environment.
3. Claim the intended organization domain through the displayed form.
4. Publish exactly the displayed DNS record at that domain.
5. Return and select **Check DNS** before the claim expires.
6. When the domain is verified, enter **Identity provider metadata URL** or **Or paste the metadata XML**.
7. Select **\*\*Register identity provider > \*\***.
8. Confirm that the connection becomes Active.
9. Open **Test** and select **\*\*Test > \*\*** for that active connection.
10. Complete a separate real sign-in using an authorized person on the domain to establish the end-user flow.

The Test control checks stored provider/domain routing and signs nobody in. Public email domains are refused. A domain belongs to one organization after DNS proof. Users admitted through that provider join as members because of the provider's authority, not just because their email matches.

Keep the DNS verification record in place while SSO is used. A missing record can suspend the connection. Restore it and **Check DNS**. If the claim expires, claim again; history is preserved. If another organization proved ownership first, follow the displayed superseded state rather than repeating the same claim.

## Disable company sign-in

1. Open the active connection under SSO discovery.
2. Confirm the domain and organizational impact.
3. Use **Disable company sign-in** when authorized to stop it.
4. Wait for the result and reread the connection state.

This is an access-affecting change. Do not use it as a test of whether the button works.

## Inspect directory provisioning and connections

SCIM status shows permitted token metadata, scopes and last use, without token material. Creating or revoking a token is not performed on this screen. Group mappings may not be exposed. Connection catalog and Connection workspace display registered providers and available configuration/state; a named provider is not proof a full connector is enabled.

Developer access and Webhook deliveries require the appropriate organization authority. A Retry tab is not an automatic retry action. Inspect the displayed failure and available control rather than assuming delivery succeeded.

## Inspect organization, billing and account lifecycle

Members and organization reads member roles/state and pending invitations. It does not make every viewer a team administrator. Department and Location records may be unavailable.

Billing and entitlements distinguishes billed subscriptions, internal grants, managed entitlement and no billing source. Review usage windows, limits and consequences where returned. The purchase/request link records intent rather than opening a guaranteed checkout. Invoices are not returned by every billing view.

Workspace switcher and setup reads workforce memberships and organization information; this edition does not establish a general switching action from that screen alone. Security and sessions/Devices read registered devices but do not imply that every revocation control is available there.

Export and account-closure views have known limitations in this edition. A ready, unexpired export can be inspected from an authorized receipt reference, but that view does not download the file. Screen headings may not match the available operation. A Closure and deletion heading does not mean you can delete an account there. Contact support for a specific export or closure request when the required action is unavailable.

---

## 13. Read notifications and delivery records

**Verification note:** notification reads and mark-read actions are checked against the software. No notifications were changed for this manual.

## Read and mark notifications

1. Open **Notification inbox**.
2. Select **Unread** or **All**.
3. Read the notification title, type, message and received time.
4. Use **\*\*Open > \*\*** to follow an available authorized record link.
5. Choose **Mark read** for an unread notification you have handled.
6. Use **Mark all read** only when appropriate for the displayed inbox action.
7. Reload Unread/All and check the resulting state and count.

Marking a notification read does not complete its underlying business task. If the action reports a problem, inspect the notice and reread the inbox before repeating it.

## Inspect preferences and receipts

Communication preferences can display essential notices, digest settings, marketing suppression and other recorded choices. This screen does not change all of them in this edition. Delivery-provider suppression overrides a stored preference.

Message delivery receipt distinguishes event, intended recipient authority, delivery state, retry and suppression information where available. A notification emitted or a request stored is not proof an email was delivered. Do not retry a message from an assumed control when the page only reads its state.

---

# 14. Resolve problems and contact support

## Decide whether to retry

| What you see                      | Next step                                                                                         |
|-----------------------------------|---------------------------------------------------------------------------------------------------|
| Sign-in required or session ended | Sign in through the official flow, then reopen the intended task                                  |
| Recent sign-in required           | Sign out/in as instructed, complete MFA if requested, and review the action again                 |
| Role or record denied             | Ask the organization/record owner about intended access; repeated retries do not grant permission |
| Capability not enabled            | Check organization availability or submit the supported access request                            |
| Workflow paused                   | Wait for the service to resume; do not create another account to bypass it                        |

| What you see                   | Next step                                                                                |
|--------------------------------|------------------------------------------------------------------------------------------|
| Required account not connected | Complete the supported account-link process; matching email alone is insufficient        |
| Record changed                 | Reload, inspect current state and prepare a fresh review                                 |
| Change saved but unreadable    | Read back later before another change                                                    |
| Result uncertain               | Check the relevant list/receipt; use an offered recovery operation with the same request |
| No data                        | Read whether it is an empty permitted result, role-scoped result or unavailable service  |
| Feature not connected          | Treat the action as unavailable on that screen                                           |

### Prepare a useful support request

Use [Winrove help](#) or [Contact](#). Include the screen name, task you were trying, approximate time, visible message and whether a receipt or stored result exists. Explain whether you were reading, reviewing or confirming a change.

Include only permitted record references and remove private information from screenshots. Never send passwords, recovery links, one-time invitation links, authenticator secrets or browser session material. Keep a local copy of the relevant error and receipt before navigating away if it is safe to do so.

## 15. Screen reference

This reference lists customer and organization-administration screens and their section labels. Inclusion does not mean that every tab contains data or every action is available. Read the chapter instructions and the messages in your account. A detail view may require you to select an authorized record first. Export and account-closure views have the limitations described in chapter 12. Platform operations are outside this customer handbook.

### Contracting and commercial records

| Screen                               | Sections                                   |
|--------------------------------------|--------------------------------------------|
| <a href="#">Opportunity explorer</a> | Filters · Saved searches · Source coverage |

| Screen                     | Sections                                                                     |
|----------------------------|------------------------------------------------------------------------------|
| Opportunity detail         | Overview · Source · Amendments · Match explanation                           |
| Company registration       | Entity import · Standing · Confirmation                                      |
| Saved searches and watches | Searches · Saved opportunities · Watch preferences                           |
| Scan control and history   | Schedule · Runs · Results · Failures                                         |
| Today and approvals        | My actions · Approvals · Recent changes                                      |
| Capture pipeline           | Stages · Owners · Award and loss                                             |
| Pursuit intake             | Source · Pack · Company · Review                                             |
| Pursuit case file          | Brief · Sources · Requirements · Qualification · Team · Milestones · Outcome |
| Source revision workbench  | Document · OCR status · Revision comparison · Locators                       |
| Requirements workbench     | Matrix · Accepted · Rejected · Source linkage                                |
| Writing workbench          | Requirement · Evidence · Draft · Human review                                |
| Reports and definitions    | Outcomes · Pricing · Source quality · Definitions                            |
| Proposal library           | Drafts · In review · Submitted                                               |
| Proposal editor            | Sections · Comments · Versions · Assignments                                 |
| Proposal generation job    | Queued · Running · Failed · Recovered                                        |
| Proposal review workbench  | Compliance · Section M · Red team · Dispositions                             |
| Document round trip        | Import · Tracked changes · SharePoint · Export receipts                      |
| Submission readiness       | Blockers · Overrides · Reviewer · Submission receipt                         |
| Estimate workbench         | Lines · Formulas · Validations · Version                                     |

| Screen                         | Sections                                                                        |
|--------------------------------|---------------------------------------------------------------------------------|
| Rate evidence                  | Observations · Selections · Sources                                             |
| BOE and scenarios              | Assumptions · Alternatives · Comparison                                         |
| Pricing approval and export    | Waivers · Approvals · Export receipt                                            |
| Intelligence explorer          | Awards · Spending · Signals · Agencies · Vehicles                               |
| Intelligence entity            | Facts · Relationships · Sources · Freshness                                     |
| Network directory              | Contractors · Partners · Vehicles                                               |
| Relationship workspace         | Profile · Reviews · Access requests · Engagements · Teaming                     |
| Past performance library       | Projects · Personnel · Sources                                                  |
| Reusable document library      | Documents · Versions · Access                                                   |
| SF330 workbench                | Personnel · Projects · Sections · Validation · Official PDF                     |
| Capability statement           | Company facts · Evidence · Preview · Export                                     |
| Contract portfolio             | Active · Pending · Closed                                                       |
| Contract workspace             | Facts · Documents · Line items · Funding · Obligations · Risks · Communications |
| Deliverable and CDRL workspace | Requirements · Submission · Acceptance · History                                |
| Contract changes               | Changes · Impacts · Approvals                                                   |
| Contract closeout              | Required records · Blockers · Acceptance · Closeout receipt                     |
| Compliance checker             | Source document · Requirements · Analysis · Review                              |
| Audit case workbench           | Documents · Requirements · Analysis · Final report                              |

## Skills and education

| Screen                    | Sections                                                         |
|---------------------------|------------------------------------------------------------------|
| Career World home         | Shift catalog · Progress · Resume                                |
| Shift briefing            | Incident · Constraints · Objectives                              |
| Career World workspace    | Terminal · Conversation · Evidence · Topology · Queue · Coach    |
| Shift after-action        | Rubric · Method · Evidence · Replay                              |
| Career map and profile    | Companies · Roles · Habits · Advancement status                  |
| Assessment setup          | Track · Scenario · Eligibility · Consent                         |
| Assessment workspace      | Brief · Terminal · Transcript · Submit                           |
| Assessment result         | Pending grade · Rubric · Debrief · Failure and retry             |
| Proof sharing             | Prepare · Consent · Activation · Revoke                          |
| Public proof verification | Valid · Revoked · Not found · Provenance                         |
| Learning library          | Tracks · Lessons · Scenarios                                     |
| Lesson and briefing       | Lesson · Practice link · Completion                              |
| Scenario library          | Level · Environment · Boss · Chains                              |
| Scenario workbench        | Problem · Environment · Steps · Hints · Validation · Publication |
| Community contributions   | Contributions · Attribution · Moderation                         |
| Practice lobby            | Rush · Gauntlet · Recent runs                                    |
| Rush session              | Discipline · Speed · Run · Practice result                       |
| Gauntlet session          | Event · Attempt · Result                                         |
| Progress and rankings     | XP · Streaks · Opt-in leaderboard · Privacy                      |
| Education home            | Schools · Classes · Invitations                                  |

| Screen             | Sections                                        |
|--------------------|-------------------------------------------------|
| Class workspace    | Roster · Assignments · Progress · Certificates  |
| Student enrollment | Age · Guardian consent · Enrollment             |
| Student workspace  | Assignments · Progress · Consent · Certificates |

## Hiring

| Screen                         | Sections                                                  |
|--------------------------------|-----------------------------------------------------------|
| Candidate directory            | Search · Filters · Saved views                            |
| Candidate workspace            | Profile · Evidence · Decisions · Activity · Upload status |
| Candidate comparison           | Role criteria · Evidence · Human review                   |
| Candidate personal profile     | Resume · Avatar · Sharing · Private records               |
| Public profile                 | Published evidence · Private · Not found                  |
| Hiring analytics               | Funnel · Definitions · Export                             |
| Recruiter setup                | Company · Tracks · Team · First invite                    |
| Assessment invitation composer | Recipients · Role template · Review · Dispatch status     |
| Role template editor           | Scenario selection · Rubric weights · Fork · Review       |
| Sequence workspace             | Stages · Delay · Reply pause · Enrollment · Delivery      |
| Screening cost worksheet       | Assumptions · Calculation · Limitations                   |
| Jobs workspace                 | Draft · Published · Closed                                |
| Job editor                     | Requirements · Application · Publishing                   |
| Public job                     | Description · Application · Closed state                  |

| Screen               | Sections                                                          |
|----------------------|-------------------------------------------------------------------|
| Interview scheduling | Availability · Connections · Bookings                             |
| Recipient booking    | Valid invitation · Available slots · Confirm · Conflict · Receipt |
| Replay workspace     | Consent · Timeline · Evidence · Access · Deletion                 |

## Workplace

| Screen                     | Sections                                                                       |
|----------------------------|--------------------------------------------------------------------------------|
| Workplace service desk     | Tickets · Queues · Owners · Service status                                     |
| Ticket workspace           | Conversation · Activity · Fulfillment · Evidence                               |
| Asset and license register | Assets · Licenses · Imports · Ownership · Maintenance · Vendors · Depreciation |
| Knowledge workspace        | Article · Versions · Freshness · Permissions                                   |
| Employee help portal       | My tickets · Request help · Knowledge · Assigned assets                        |
| Team skills map            | Organization · Skills · Evidence permission                                    |

## Workforce and restricted recipient views

| Screen                  | Sections                                                   |
|-------------------------|------------------------------------------------------------|
| People directory        | People · Employment type · Department · Location           |
| Person workspace        | Employment · Journeys · Documents · Clearances · Access    |
| Journey register        | Joining · Leaving · Returning · Readiness                  |
| Journey intake          | Person · Kind · Dates · Template · Review                  |
| Journey workspace       | Tasks · Owners · Readiness · Invitations · Activity        |
| Returning worker intake | Existing person · Return date · Template fallback · Review |

| Screen                        | Sections                                                            |
|-------------------------------|---------------------------------------------------------------------|
| Workforce import              | Map columns · Validate · Preview · Row results · Retry              |
| Template library              | Joining · Leaving · Returning · Versions                            |
| Workflow template editor      | Steps · Conditions · Owner · Required status · Publish              |
| Form designer                 | Fields · Validation · Preview · Save state                          |
| Task workspace                | Instructions · Input · Owner · Dependencies · Completion evidence   |
| Workforce document vault      | Classes · People · Versions · Retention                             |
| Document workspace            | Preview · Provenance · Access · Retention · Legal hold              |
| Signature envelope            | Document snapshot · Signers · Consent · Status · Certificate        |
| Document generator            | Document type · Verified facts · Preview · Store · Download         |
| My joining journey            | Tasks · Readiness · Help                                            |
| My task                       | Instructions · Upload · Form · Training · Equipment acknowledgement |
| My signature                  | Exact document · Consent · Sign · Receipt                           |
| My documents                  | Shared with me · My uploads · Status                                |
| My conversation               | Messages · Participants · Delivery                                  |
| My worker profile             | Contact details · Preferences · Help                                |
| Workforce compliance register | Background checks · Eligibility · Clearances · Due dates            |
| Compliance case               | Required inputs · Provider state · Human review · Evidence          |
| Audit trail and integrity     | Events · Chain verification · Incidents                             |
| External review grants        | Scope · Recipient · Expiry · Revocation · Access history            |

| Screen                     | Sections                                                     |
|----------------------------|--------------------------------------------------------------|
| External auditor workspace | Permitted journeys · Documents · Signatures · Audit · Export |

## Connections and account administration

| Screen                       | Sections                                                     |
|------------------------------|--------------------------------------------------------------|
| Connection catalog           | ATS · HRIS · Signatures · CRM · Directory · Availability     |
| Connection workspace         | Configuration · Scopes · Test · Sync · Failures · Disconnect |
| Developer access             | Keys · Quotas · Partner API · Embeds                         |
| Webhook deliveries           | Endpoints · Signing · Deliveries · Retry                     |
| SSO and directory            | SSO discovery · Test · Groups · SCIM status                  |
| Sign in and recovery         | Sign in · Reset · Email verification · Callback failure      |
| Account enrollment           | Account · Verification · Workspace invite                    |
| Security and sessions        | MFA · Sessions · Devices · Revocation                        |
| Workspace switcher and setup | Workspaces · Company setup · First pursuit                   |
| Members and organization     | Members · Invites · Roles · Departments · Locations          |
| Portal appearance            | Customer branding · Domain · Preview                         |
| Scoped search                | People · Work · Permitted records · No matches               |
| Billing and entitlements     | Plans · Seats · Module access · Usage · Invoices             |
| Export jobs                  | Scope · Completeness · Progress · Download · Expiry          |
| Closure and deletion         | Scope · Consequences · Confirmation · Retention · Receipt    |

| Screen                    | Sections                                                                     |
|---------------------------|------------------------------------------------------------------------------|
| Notification inbox        | Unread · All · Preferences · Delivery state                                  |
| Communication preferences | Essential notices · Digests · Marketing · Quiet times                        |
| Message delivery receipt  | Event · Recipient authority · Delivery · Retry · Suppression                 |
| Evidence index            | Owned · Shared · By domain · Provenance                                      |
| Evidence workspace        | Source · Versions · Owner · Access · Revocation                              |
| Reviewed handoff          | Source event · Identity match · Allowed records · Recipient review · Receipt |
| Handoff history           | Prepared · Awaiting review · Accepted · Failed · Reconcile                   |
| Devices and native access | Registered devices · Revoke · Deep-link diagnostics                          |
| Companion capture         | Source · Allowed data · Review · Capture receipt                             |
| Desktop folder review     | Selected folder · Detected documents · Review upload · Permission            |

## Additional delivery, compliance and evidence views

These additional workflow families extend chapter 10. Their availability and your authority must be confirmed for your organization. This reference does not announce activation or promise an available action button.

| Task family          | What to check                                               |
|----------------------|-------------------------------------------------------------|
| Delivery overview    | Readiness is a service result, not acceptance               |
| Delivery register    | A permitted list can be narrower than all contracts         |
| Award handoff review | Review and recorded handoff are different stages            |
| Obligations          | Keep obligations bound to their source and revision         |
| Occurrence timeline  | An obligation and each due occurrence are different records |
| Work packages        | Creating, linking and changing state require authority      |

| Task family                   | What to check                                             |
|-------------------------------|-----------------------------------------------------------|
| Deliverable record            | Inspect the relevant snapshot/version                     |
| Submission composer           | Preparing a submission is not sending or acceptance       |
| Receiving decision queue      | Pending, decided and returned submissions differ          |
| Receiving decision            | Review the submission and decision authority              |
| Receiving authority directory | Enrollment is separate from a person's identity           |
| Authority chain               | Recorded authority, verification and revocation differ    |
| Amendment register            | An opened review is not an applied amendment              |
| Amendment impact              | Resolve impact before treating change as effective        |
| Closeout readiness            | Readiness is not a completed closeout                     |
| Compliance programs           | Program identity and scope must be explicit               |
| Program scope                 | Scope versions and mapped obligations differ              |
| Control catalogues            | Imported and accepted catalogue versions differ           |
| Control record                | Applicability, implementation and review are separate     |
| Assessment runner             | Objective results belong to a specific assessment         |
| Assessment record             | Submission and finalization are separate                  |
| Findings and remediation      | Completed work is not verified remediation                |
| Exceptions                    | An exception needs explicit recorded authority            |
| Evidence library              | A reference is not blanket permission to use it           |
| Evidence purpose review       | Review each intended use                                  |
| Evidence packages             | Building, publishing, sharing, retention and holds differ |
| Performance reuse approvals   | Reuse grants and approved claims are distinct             |

## 16. About this edition

This customer edition is version 1.2, dated 29 September 2026. It covers the documented customer and organization-administrator experience, including restrictions and unavailable actions. It is not a guarantee that every capability is enabled for your account.

The instructions were checked against the software. Normal password sign-in with an existing authenticator challenge and selected signed-in reads were verified on 29 September 2026.

Successful writes, recovery and permission checks have not been independently completed for every task in this edition. The handbook therefore does not claim end-to-end verification. No real customer records, account secrets or live invitation links appear in its examples.

If a label, control or result differs from this handbook, follow the application's current availability message and contact [Winrove help](#). Give the task and screen name, the handbook date and the displayed message. Do not send passwords, recovery codes or private links.

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## 17. Additional read-only boundaries

**Organization setup:** the current screen reads organization information. It does not provide a verified SAM import-and-confirm workflow. Use the organization's approved onboarding process when information needs to change.

**Permitted records:** the current view lists the user's saved searches. It does not execute a new live opportunity search from this screen. For a new search, use Opportunity explorer and check its returned results.

**Desktop and capture:** these screens list registered devices and staged captures. They do not provide device revocation, folder selection or file upload here. A staged record is not evidence that a new upload completed.

The screen reference covers customer-facing application areas. Public website navigation is covered by the separate Winrove website guide. Platform-operator controls are documented separately for authorized staff.