Elevate - Starting New Projects

Getting started is simple.

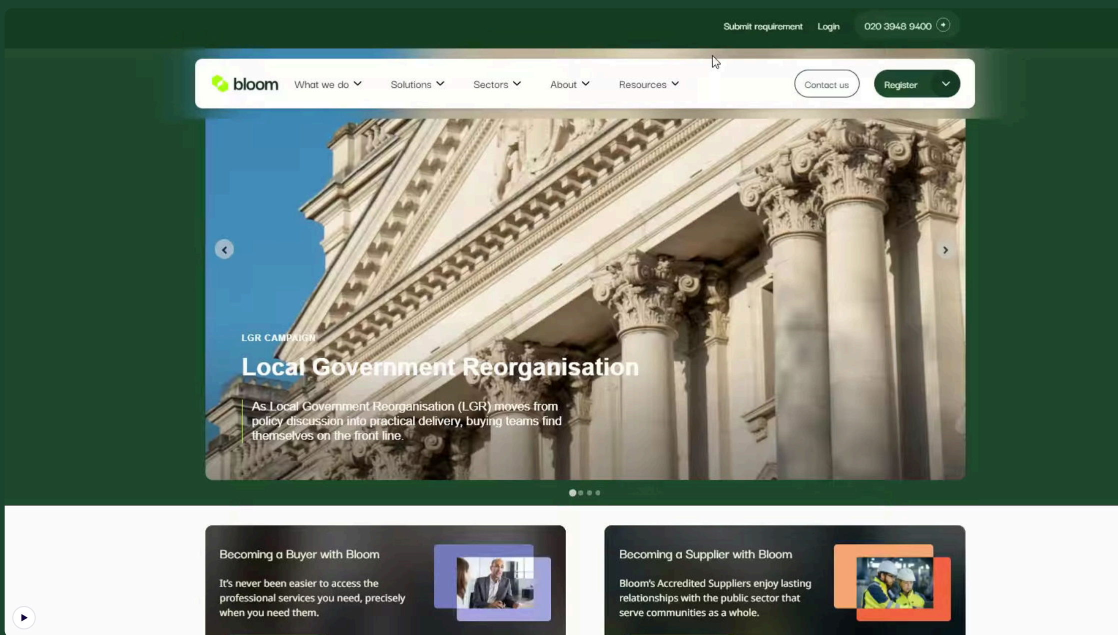
This guide walks you through starting new projects with Bloom, via Elevate, our very own platform. Follow along to submit your request and move your project forward.

Contents

Logging into Elevate

Elevate can be accessed directly from the Bloom website.

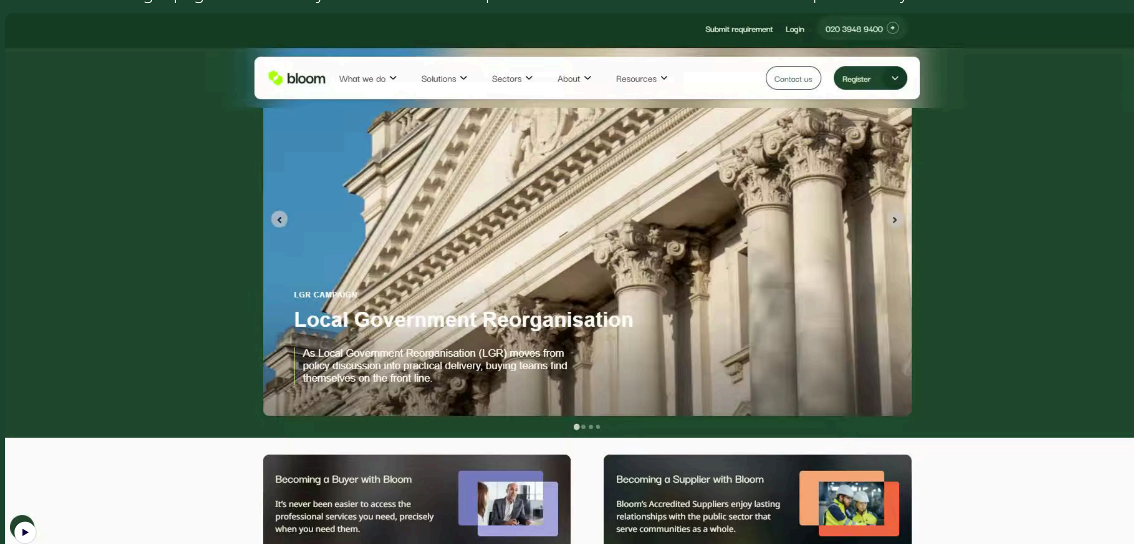
1. Navigate to the Bloom website and click "Login", then "Log in to Elevate"
2. On the Elevate login page, enter your work email address.
3. Enter your password.
4. Click "Sign in".



Please watch video in full screen

Don't have an account?

Please use the links provided on the Login page and submit your details. Your request will be reviewed and access will be provided by Bloom.



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Tips & best practice

Always use your work email address.

If you're unsure whether you have access, contact Bloom.

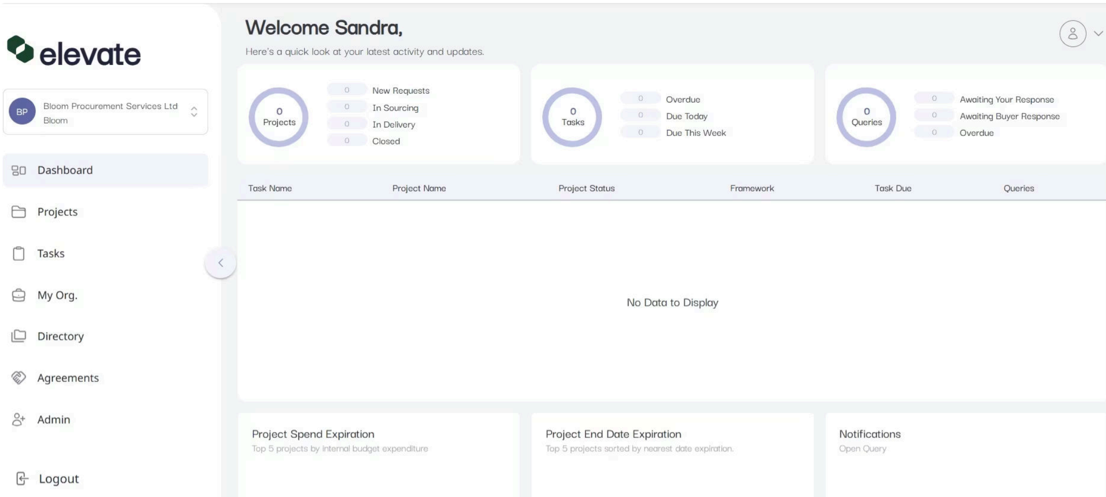
FAQs

I don't have an account: Use the "I do not have an account" option on the login page to request access.

I can't sign in: Check your email and password are correct, and make sure you're using your registered work email.

Getting Started: Your Dashboard

The dashboard provides an overview of your projects and key actions, helping you prioritise your workload. The information displayed is based on your buyer account permissions, role, and project involvement.



OVERVIEW

On the dashboard, you will see an overview of projects, tasks with core statuses and queries.

REVIEW

You can review:

- Tasks table, showing the top 5 urgent tasks that need your attention, sorted by deadline (combining New Project Request and in-delivery tasks)

- Notifications of new queries, responses, reassignments and updates

- Review projects that are close to their end date or are nearly out of budget

Click on any task, query or project to go straight to its detailed view.

Tips & best practice

The dashboard task KPIs show "Overdue", "Due Today", and "Due This Week".

Keep your tasks up to date to ensure accurate visibility.

Respond to queries promptly to keep projects moving.

Regularly review expiring projects to avoid last-minute issues.

New Project Request Feature

Learn how to create a new project request by following the step-by-step question journey. You must be logged in as a Buyer and have access to this feature.

Open dashboard or projects page and select "New Project Request" button.

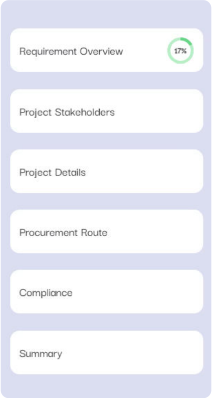
New Project Request

Enter the project title, alongside all mandatory questions (will have a * next to them).

Upload clear and accurate specification and supporting documents during this process.

The maximum upload size is 64 MB.

Use the progress bar to track completion of the required questions by stage. Your answers are saved automatically as you navigate between sections within the same session, you can either save the draft to complete later or submit for approval if all mandatory questions are answered.



If you have pressed "Save and Exit", you will trigger a "Submit New Project Request" task which can be found on your tasks page. A task is generated reminding you to complete and submit the New Project Request. To resume, go to the projects page and open the draft.

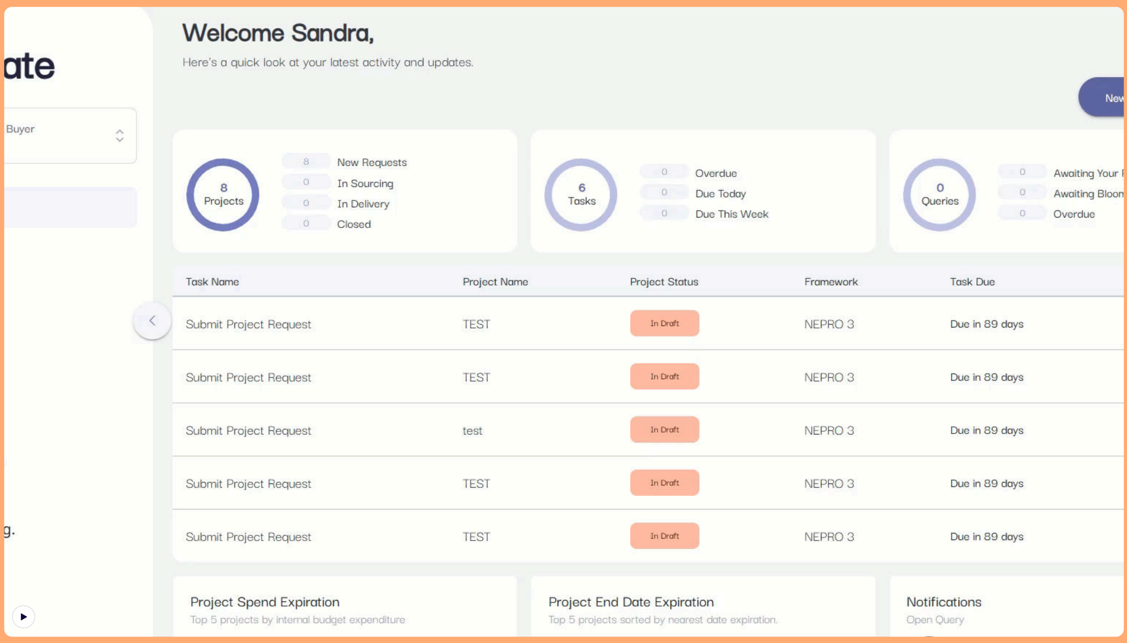
Stakeholders added during the draft stage can view the draft.

If you pressed "Submit", you will find the form in Projects, as well as in the Tasks bar.

If your organisation requires internal approval, the request moves to Buyer Approval first and an approval task is triggered. Please see slide 6 if this is applicable.

Otherwise, Bloom receives a notification, your submitted answers and uploaded specifications become visible to Bloom teams, and queries remain available for collaboration.

New Project Request Step-by-Step Video



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Tips & best practice

- Tooltip guidance is available throughout the form to explain fields and requirements.
- Adding detailed & accurate project information helps speed up review and approval.
- Complete all mandatory questions carefully to avoid delays.
- Save drafts regularly if you're gathering information from multiple stakeholders.
- Drafts have 90 working days before becoming overdue.

FAQs

I don't have all the information yet. Save your progress as a draft and return later.

I need clarification while completing the form. Raise a query directly within the New Project Request journey (see B-11).

Can multiple stakeholders collaborate on a draft? No - stakeholders added during the draft stage cannot access and collaborate on the New Project Request

I can't submit the New Project Request. Ensure all mandatory questions are completed and required documents are uploaded.

What happens if approval is rejected? A new submission task is generated with the approver's feedback visible. You can then edit your answers to meet the requirements set for project approval. (see B-07).

Understanding Your Internal Approval Process

HOW INTERNAL APPROVAL PROCESS WORKS
REVIEWING & RESUBMITTING AFTER APPROVER REJECTION

HOW INTERNAL APPROVAL PROCESS WORKS

If your project requires internal approval, you will follow these steps:

There are two ways an NPR can be approved:

Option 1 – Pre-Approval

The required approval is obtained before the NPR is submitted. The requester uploads the approval evidence (such as an approval email or signed document) as part of the submission. Bloom will review the attached evidence during the initial project review.

Option 2 – Choose an Internal Approver

Where project approval is required after NPR submission and prior to Bloom reviewing, the NPR is automatically routed to the user nominated as the Project Approver. The approver receives a notification and can approve or reject the request within the system.

Steps:

1. Submit pre-approval evidence during submission OR
2. Select your project approver from the list of users in your organisation
3. This will trigger a task to the selected project approver to review your answers and then reject or approve your request.

HOW INTERNAL APPROVAL PROCESS WORKS
REVIEWING & RESUBMITTING AFTER APPROVER REJECTION

REVIEWING & RESUBMITTING AFTER APPROVER REJECTION

1. Open the "Submit New Project Request" task created following the rejection.
2. Review the approver's rejection notes and feedback.
3. Make the necessary changes to your project request.
4. Save and Exit the New Project Request Form
5. Mark your assigned task as complete
6. The resubmitted request re-enters the approval workflow.

Tips & best practice

Where business approval is required, Elevate automatically triggers an approval task for the assigned Project Approver, with a 24-hour SLA.

The approver reviews the submission and accepts or rejects it, with the ability to leave notes and feedback.

If the nominated approver is unavailable (for example, they are on leave or do not have access to the system), the requester can:

- Withdraw the NPR.
- Resubmit it with a different Project Approver; or
- Obtain approval outside the system and attach the approval evidence when resubmitting, using the **Pre-Approval** process.

Managing & Viewing Projects

ADDING & MANAGING PROJECT STAKEHOLDERS | VIEWING & NAVIGATING YOUR PROJECTS

Adding & managing project stakeholders

Prerequisites:

- You must be the Project Owner to add or remove project members.

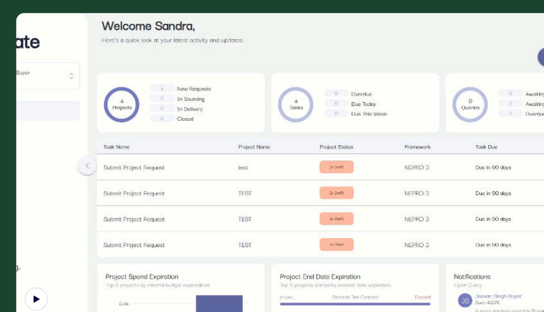
Steps:

1. Add stakeholders to the New Project Request form **OR**
2. From your Project Summary Page, select the team members dropdown to view all members of your project
3. Click 'Add Member' to search through your organisation list and select a Project Member
4. Assign the Project Member a Role
5. If there are two members with the same role, toggle on 'Primary' for them to be assigned all role-based tasks by default.

Tips & best practice

Stakeholders added to the form are automatically linked to the project on submission. These are not added on Save and Exit

During the draft stage, any stakeholders added via the project summary can view your New Project Request Answers via the specification tab.



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ADDING & MANAGING PROJECT STAKEHOLDERS | **VIEWING & NAVIGATING YOUR PROJECTS**

VIEWING & NAVIGATING YOUR PROJECTS

Prerequisites:

- You must be assigned to the projects you want to see. What you see depends on your role and assignment.

Steps:

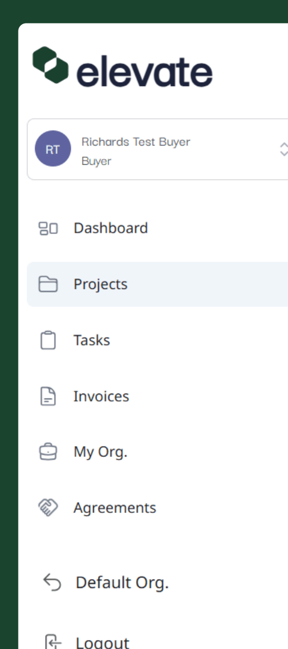
1. Open the projects page. It shows both in-delivery projects and New Project Requests in one place.
2. Search for a project by name or Project ID.
3. Order the list by a visible column (for example Project name, Project ID, Project Stage, Project Status, or Suppliers).
4. Filter by Project Status.
5. Click into a project to view it.
6. To start a New Project Request, select "New Project Request".

Tips & best practice

If you can't see a project, you may not be assigned to it, or your role may not allow access.

If you can't take action on a project, you may have read-only access.

If you can't find a project, search by name or ID, or adjust your filters.



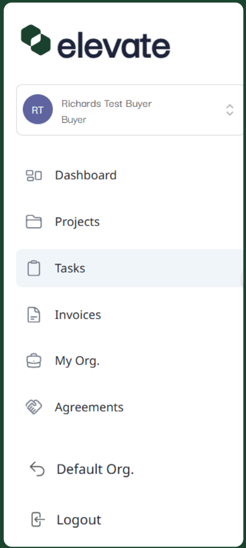
What happens next:

For New Project Request projects, the project summary page displays the approval journey and highlights the current status.

Managing Your Tasks

Tasks can be seen directly on Elevate.

1. Open the Tasks tab. It shows the tasks assigned to you.
2. Search for a task by task name.
3. Filter tasks by Task Status, Project Status, Buyer, or Supplier.
4. Sort tasks by Task Name, Task Status, Project Status, or Supplier.
5. Click into a task to review and complete it.
6. Secondary to this, the task can also be found within the Project Summary Page



Tips & best practice

A task goes "On Hold" when a query is raised against it. You can open any on-hold task, and as a buyer you can complete an on-hold task if it's assigned to you - open queries do not block you from completing it.

Understanding Queries

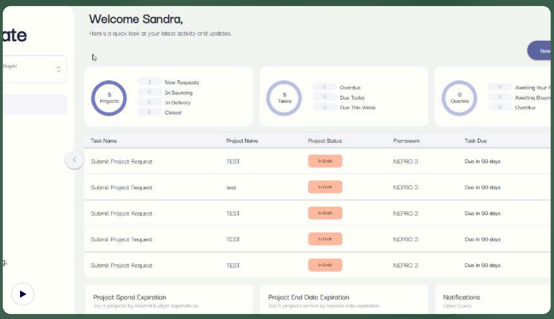
RAISING A QUERY | RAISING A QUERY WITHIN THE NPR FORM | RESPONDING & CLOSING QUERY

Prerequisites:

- You must be assigned to the project or added as a stakeholder. - Queries are available for projects at the "New Request" stage only (not Delivery) at New Project Request go-live.

Steps

1. Go to the relevant project, task, queries tab, or New Project Request question form.
2. Select "Raise Query" (if via the Actions column select the three dots)
3. Enter the required details.
4. Assign the query to the relevant user (internal or Bloom).
5. Attach any supporting documents (optional).
6. Click "Submit".
7. Once a draft is saved, queries are linked directly to the draft project and remain visible throughout the approval process.



Please watch video in full screen

RAISING A QUERY | **RAISING A QUERY WITHIN THE NPR FORM** | RESPONDING & CLOSING QUERY

You can raise a query at any point while completing the form, without leaving it.

1. While completing the form, select "Raise Query". 2. Enter the required details.

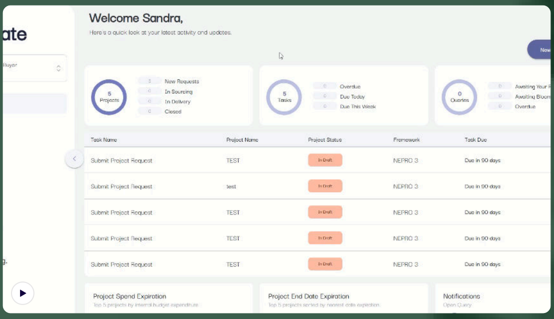
3. Assign the query to the relevant user (internal or Bloom).

4. Attach any supporting documents (optional).

5. Click "Submit".

Because the project title is captured as the first field of the NPR, any query you raise from the form is automatically linked to that project. Once you save the draft, the query stays linked to the draft project and remains visible throughout the approval process.

Once a draft is saved, queries are linked directly to the draft project and remain visible throughout the approval process.



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Tips & best practice

Every query is linked to a project - the project title is captured at the start of the New Project Request, so queries are tied to a project from the outset. Linking to a task is optional.

Queries can be retrospectively assigned to a project or task.

Assign queries to the right person early to avoid delays, and use deadlines consistently to support prioritisation.

Keep communication within queries to maintain a clear audit trail.

RAISING A QUERY | RAISING A QUERY WITHIN THE NPR FORM | **RESPONDING & CLOSING QUERY**

Prerequisites:

- A query must exist that you raised or that is assigned to you.

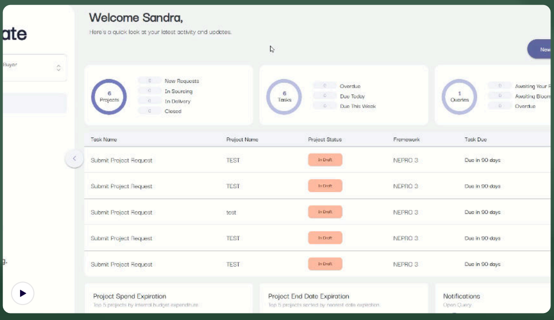
Steps:

1. Find the query in your Tasks / Queries Tab.
2. Open the query.
3. Add your response via the respond button (This will automatically reassign the query to the query owner on completion)

Alternatively:

1. If you are the query assignee and respond via the '+', your response will be added to the thread with no reassignment
2. Reassign the query to another buyer member within the project if needed.
3. Close the query once it has been resolved.

The query thread with the response field, and the reassign and close actions.



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Tips & best practice

Close queries promptly once resolved.
Responses are visible to all project members and keep a clear audit trail.

Understanding Project History & Audit Trail

Prerequisites:

- You must have access to the project.

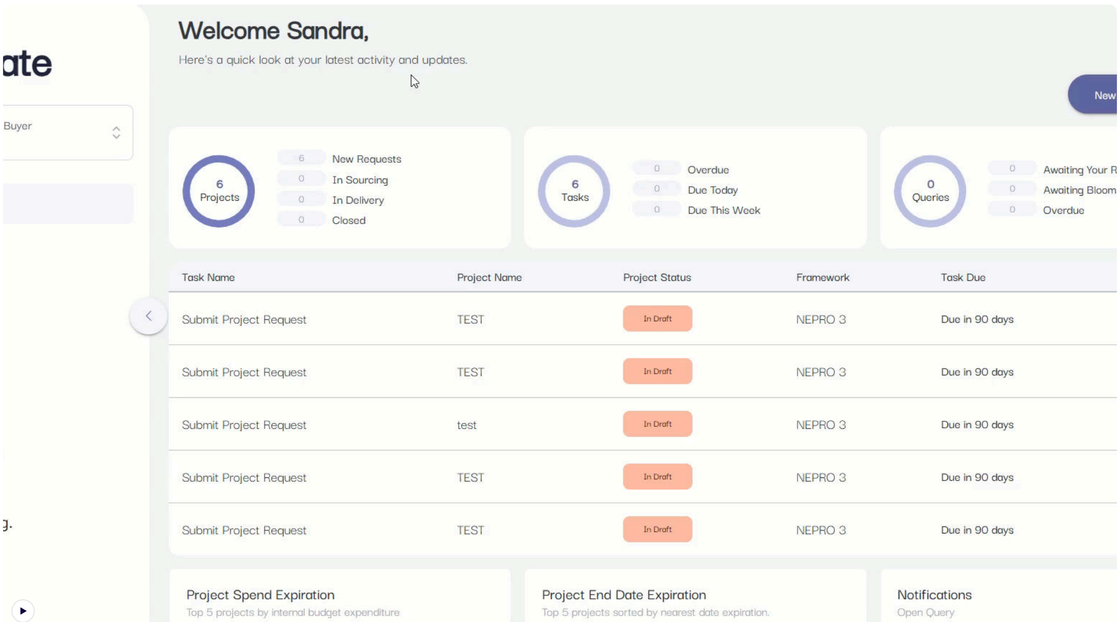
Steps:

1. Open the project and go to the History tab.
2. View the logged events, each with its timestamp and the user who performed the action.
3. Filter events by activity type (for example Query Opened, Task Assigned, Document Uploaded, Task Completed, Query Closed).
4. View the details of any event.

Tips & best practice

The audit trail is immutable and complete.

Understanding Project History & Audit Trail Step-by-Step Video



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Approver & Stakeholder Guides

Approver Guide: Reviewing & Approving Project Request

How to review an approval task and accept or reject it. For users with the Approver role only.

Prerequisites:

- You must hold the Approver role, and the project must require internal approval.

Steps:

1. Open your approval task.
2. Review the project submission using the New Project Request and Specification Tabs.
3. Accept or reject the request, leaving notes and feedback.

The approval Task work flow and Approve/Reject options

Tips and best practice:

- Approval tasks have a 24-hour SLA.
- As an approver you can view approval-related tasks only, and you can search and filter approval tasks.

What happens next:

- If you accept, the project moves from Buyer Approval to Submitted, and the Q&C team's first task is triggered.
- If you reject, a new "Submit New Project Request" task is generated for the project owner, with your notes and feedback visible.

Stakeholder Guide: Viewing Projects

How to view the projects you've been added to and collaborate on draft answers.

Prerequisites:

- You must have been added to a project as a stakeholder.

Steps:

1. Open the projects page to see the projects you've been added to.
2. Search for a project by name or Project ID.
3. Filter or order the list as needed.
4. Click into a project to view its summary (read-only).
5. During the draft stage, view the draft answers via the specification tab to collaborate.

Tips and best practice:

You can view only the projects you've been added to, and summaries are read-only.

Reviewing Clarifications From Bloom

How to review clarifications raised by Bloom during their review and respond to it.

Prerequisites:

- Bloom has reviewed your request and a "Review Project Request Clarification" task has been created for you.

STEPS TO FOLLOW FOR BLOOM CLARIFICATIONS

STEPS TO FOLLOW FOR BLOOM CLARIFICATON

1. Open the "Review Project Request Clarification" task.
2. Review the clarifications raised by Bloom in the Notes section.
3. Action clarification request
4. Complete the task
5. On completion leave a note with a summary of completion and any additional comments for Bloom review context

Tips & best practice

If the request is unclear or you need more insight and support to complete this task, raise a query against the task to your project PBP

Reference Guide: Definitions

STAGES	STATUS	STATUS BY STAGE

STAGE	DEFINITION
New Request	The New Project Request submission and approval journey.
Sourcing	Project approved and sent to JAGGAER for sourcing.
Delivery	Project actively being delivered.
Closed	Project completed.

STAGES	STATUS	STATUS BY STAGE

STATUS	DEFINITION
In Draft	Buyer has started but not submitted the New Project Request.
Buyer Approval	New Project Request submitted for buyer approval, not yet submitted to Bloom.
Submitted	New Project Request submitted by the buyer (post buyer approval); Bloom review not yet triggered.
Preparing For Sourcing	All validation checks passed; being prepared for JAGGAER handoff.
Approved	Fully approved and handed off to sourcing.
Rejected	Project rejected at a review stage.
Not Started	Project stage not started.

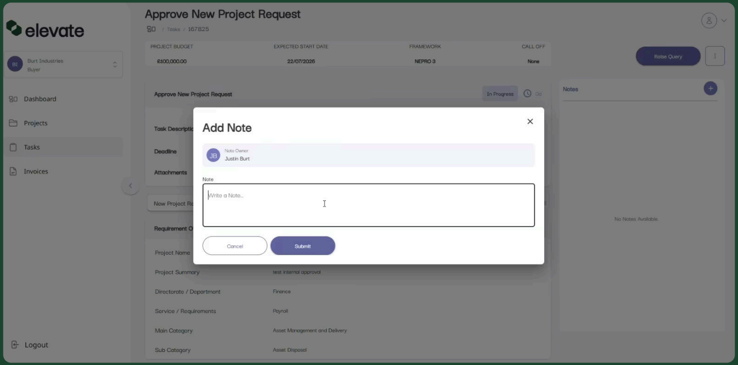
STAGES	STATUS	STATUS BY STAGE

STATUS BY STAGE	DEFINITION
New Request	In Draft, Submitted, Rejected, Preparing For Sourcing, Approved.
Delivery	Set Up Incomplete, Not Started, In Progress, On-Hold, Completed, Archived.
Closed	Completed.

Reference Guide: Adding Notes

Steps:

1. Open the task.
2. Add a note by clicking the '+' button at any time to leave context, feedback, or guidance for the next task user .
3. When you complete a task as a buyer, add a note in the popup presented if you haven't already added one.



Tips and best practice:

- Notes are public to all task users and feed from task to task, with the latest note at the top.
- Notes differ from comments: notes are visible to all task users, while comments are Bloom-only and hidden from buyers.

Reference Guide: Query KPIs & Status Reference

QUERIES	STATUS
Query KPIs - Buyer	• Overdue • Awaiting Your Response • Awaiting Bloom Response • Total Queries
Query KPIs - Bloom	• Overdue • Awaiting Your Response • Awaiting Buyer Response (on a Bloom account this should read "Awaiting Client Response") • Total Queries
Query Status	• Open / Closed
Query Information Displayed (Queries Tab)	• Query Title • Project Name • Days In Flight • Query Status • Assignee

Thank you!

Any queries, please get in touch with your Procurement Business Partner.

You can also contact us by email on support@bloom.services or by calling 020 3948 9400..

Get in touch

FAQs

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