



Evaluate Sollerius on your work.

For specialist advisory firms.

The purpose	Examine how Sollerius could support a workflow in an advisory service you deliver, or a service idea worth investigating. Work through the inputs, prepared output and professional review using sample material or information you have permission to share.
What you receive	At the time we agree, you receive a provisional Fit Note recording what you observed, what your team reported and what still needs checking. It helps you decide whether to request a quote, check an open question, take a simpler route, revisit later or stop.
What to agree first	The workflow, permitted material, people preparing and reviewing the work, criteria, session arrangements, any fee and access boundaries.

Taking part creates no trial entitlement, subscription or installation commitment.

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Prepare the work to examine.

Start with a service you deliver or a service idea worth investigating.

01 **Name the job.**

Describe what you need to produce and where you get stuck. For a new service idea, record what still needs to be established.

02 **Choose a safe sample.**

Use sample data or expressly permitted non-confidential material. Agree the basis before sharing anything. Do not send client-confidential files through the enquiry route.

03 **Name the people.**

Identify the practitioner who understands the work and the professional reviewer who can judge the result.

04 **Agree the test.**

Set a small number of specific questions and pass conditions, including quality, correction and effort.

05 **Confirm arrangements.**

Agree date, time zone, scope, any fee and whether the session is operator-led. Access is confirmed separately.

During and after

Follow the source material into the output. Ask the practitioner to explain what they would change. Let the reviewer assess the corrected result against the agreed questions. Record missing evidence and extra review effort as carefully as useful output.

Agree who will write up the findings and when you will receive them. Record any next action and who will take it, or agree to finish here.

Use page 5 to record the workflow and agreed criteria.

Your professionals review the output.

Confirm whether the session is operator-led or uses separately provisioned access. Public website access does not grant a product account. Agree input permissions, processing providers, retention and any transfer route before supplying material.

Full saved screen, reduced.

Cedar Review · fictional sample.

26 October 2026
Report v7 / source v5

Your decision

Report v7 · source v5

✓ Accepted for this saved version

Decision detail from the same saved screen. It records review of report v7 on source v5; it does not establish a customer result or validate the effort estimate.

What was checked

Saved internal checks from 26–27 October show sample preparation, exact-version review, a source-change hold, export and general Chat. Catalogue navigation shows structure, not that every workflow runs. A second company member was tested on one permitted workflow.

Separate decisions

Professional review is separate from delivery, client acceptance, payment and access. When the inputs change, review the affected work again.

Before installation

Agree setup, access, support, operating costs, responsibilities and completion conditions in a buyer-specific written scope. External buyer access and connections require separate verification.

Check the effort estimate first.

Illustrative. Fictional firm, format only. No buyer reviewer participated.

Your service and aim

Harbour Advisory wants to use AI to prepare a capacity-planning note while keeping uncertain effort estimates visible.

What we observed

The Cedar internal demonstration shows report v7 on source v5, a modelled comparison and a recorded review reason. It provides the sample for this discussion.

What you told us; what needs checking

The team says gathering sources is repetitive. The person checking the note needs confirmed and provisional demand separated and the hours-per-job estimate explained. No preparation time has been measured.

Review decision and limits

Unresolved. The five-hours-per-job assumption, the standard for accepting the note and any time saving remain unvalidated.

Next action, owner and date

Check the effort estimate and what the person reviewing the note needs before considering a quote. Owner and date: to be agreed in a real session.

Prepared / reviewed / delivered

Not completed for this example.

Record the session.

Nothing is submitted automatically. For longer entries, use the web worksheet. Check all text in your saved or printed copy.

Before the session

Firm, service and sponsor

Workflow and evaluation question

Material and permission to use it

Who prepares and reviews the work

During the session

What you tried, observed and checked

The decision

Review decision — accepted, rejected or unresolved (defined on page 6); reason and limits

Next action, owner and date

Who will write the Fit Note and when

Your session findings.

Provisional. Yours to keep, forward and correct. This note creates no paid commitment, access entitlement or support arrangement.

Your service and aim

What we observed

What you told us; what needs checking

Review decision and limits

Next action, owner and date

Prepared / reviewed / delivered

Accepted: every agreed criterion was observed to pass. **Rejected:** the reviewer declines the evaluated result, with a reason. **Unresolved:** more evidence or work is needed before deciding.

For longer entries, use the web worksheet. Check all text in your saved or printed copy.