



Build Sites as a team.

Make your work interactive while people
own every important decision.

BUILD

one useful workflow

COORDINATE

bounded contributions

APPROVE

before any release



Choose the Site your team needs.

Open the Sites tab for How to Sites and a prompt for each of these jobs.

HTML SLIDES

Present the story

Use editable slides, speaker notes, sources, and a focused presentation view.

DASHBOARD

Explore the results

Use shared filters, trend charts, detail tables, and source links.

FINANCE REVIEW

Close or forecast

Review actuals versus plan, or explain forecast changes and decisions.



Keep one owner as the team contributes.

One owner approves the result. Editor and viewer access depend on the workspace.

SEPARATE TASKS, ONE OWNER

One owner reviews

Contributors take separate tasks. The owner combines the work and approves each final change.

SHARED SOURCE + HUMAN REVIEW

Separate Git branches

Isolate each draft and review it. GitHub pull requests are optional when available.

Make the next step easy to find.

Use the same useful parts, then adapt the content and controls to the job.

1

Header

Name the job, owner, period, and review status.

2

Tabs

Organize what people need to read or do.

3

Toolbar

Add working filters, search, export, or presentation controls.

4

Mascot

Help people find answers in the approved content.

5

Sources

Show dates, definitions, and missing inputs.

Bring the monthly close into one Site.

Use synthetic results to practice the workflow, not to make a real finance decision.

APPROVED SOURCE

Fictional actuals + plan

Use synthetic results with a period, currency, and clear definitions.

WORKING SITE

One close review

Show results, variances, actions, and sources with useful filters and a mascot assistant.

REVIEW + APPROVAL

Reconcile, then review

Check totals, explanations, and controls. Ask before publishing or changing access.

Try one useful Site with the team.

Start with a fictional monthly close, or choose another example in the Sites tab.

5 MIN

Choose a prompt

Open Sites. Choose the job, owner, and approved fictional inputs.

7 MIN

Review one preview

Agree on the plan. Build a local draft only after approval.

3 MIN

Check the result

Test sources, controls, and a fresh case. Ask before sharing.

Copy this prompt to get started.

Adapt the fictional example to your approved sources and real team workflow.

Plan a monthly close review Site using approved fictional actuals and plan. Name one human owner. Include a period-and-currency header; Summary, Results, Variances, Actions, and Sources tabs; a working filter-and-export toolbar; and a mascot assistant grounded in those sources. Reconcile totals and flag unsupported explanations. Show the plan first. Only after I approve, build and test a local preview on desktop and mobile. Do not connect live services, send, publish, deploy, share, change access, or claim unavailable capabilities without explicit approval.

Start in the Sites tab.

Read How to Sites, choose a prompt, and review one local draft before sharing.

1 | READ

Explore How to Sites

Open the Sites tab

See the workflow

Choose one real job

2 | CHOOSE

Pick a starting prompt

HTML slides or dashboard

Monthly close review

Forecast brief

3 | REVIEW

Check the local preview

Test controls and sources

Check desktop and mobile

Ask before publishing