

# User Manual for “Project Management Module”

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## DESIGNATION DETAILS

SAVE UPDATE CLEAR REPORT 6

Code:  1  Active

Name\*:  2

Abbreviation\*:  3 (Limit-5)

Description:  4

| 5      | Code     | Name      | Abbreviation | Description | Active | Enter By      | Enter Date             | Edit By       | Edit Date             |
|--------|----------|-----------|--------------|-------------|--------|---------------|------------------------|---------------|-----------------------|
| SELECT | HDG-0001 | MANAGER   | MAN          |             | True   | Administrator | 11/13/2018 12:21:00 PM | Administrator | 11/19/2018 4:00:00 PM |
| SELECT | HDG-0002 | PARTNER   | PAR          |             | True   | Administrator | 11/16/2018 11:29:00 AM | Administrator | 11/19/2018 4:00:00 PM |
| SELECT | HDG-0003 | TEAM LEAD | TL           |             | True   | Administrator | 11/27/2018 4:02:00 PM  | Administrator | 11/27/2018 4:02:00 PM |

HOME
 ADD TO FAVORITE
 REMOVE FAVORITE

Select Language

|   |  |
|---|--|
| <b>1.</b> Auto-generated Number (Entry Reference No.)   | <b>2.</b> Enter the Designation name                           |
| <b>3.</b> Enter an abbreviation for the Designation (Max 5 digits)  | <b>4.</b> Enter the description about the designation (if any) |
| <b>5.</b> The list of all the designations available in the system with their details. Use the SELECT button to edit the details of any designation | <b>6.</b> Action buttons to Save, Update, Clear, and Report    |

## EMPLOYEE DETAILS

|  |   |
|--|---|
| 1. Auto-generated Number (Entry Reference No.)   | 2. Enter the name of the Employee   |
| 3. Select the designation  | 4. Select the business unit of the employee   |
| 5. Select the software User ID for this employee. These users can be created in the user management module | 6. Select the reporting site of the employee  |
| 7. General Remarks/ Narration/ Description   | 8. Actions buttons to SAVE, Update, FIND, CLEAR (REFRESH), DELETE, REPORT VIEW, and DOCUMENT ATTACHMENT |

## PROJECT DETAILS

SAVE

UPDATE

CLEAR

REPORT

DOCUMENTS

9

Code:   Active 1

Name\*:  2

Abbreviation\*:  (Limit-50) 3

Description:  4

Customer:  5

Business Unit:  6

Site\*:  7

| 8      | Code       | Name       | Abbreviation | Description | Customer Code                  | Business Unit Code | Active | Enter By      | Enter Dat        |
|--------|------------|------------|--------------|-------------|--------------------------------|--------------------|--------|---------------|------------------|
| SELECT | PRO-000001 | PROJECT 01 | P1           |             | 1.001.0001.00003.000001.000001 | BSU-0002           | True   | Administrator | 1/9/2018 4:08:00 |
| SELECT | PRO-000002 | PROJECT 02 | P2           |             | 1.001.0001.00003.000001.000002 | BSU-0002           | True   | Administrator | 11/12/2018 11:20 |

|  |   |
|--|---|
| <b>1.</b> Auto-generated Number (Entry Reference No.)  | <b>2.</b> Name of the Project   |
| <b>3.</b> Abbreviation of the project (up to 50 characters)                                      | <b>4.</b> General Remarks/ Narration/ Description   |
| <b>5.</b> Select the customer name who awarded the project                                       | <b>6.</b> Select the business unit to which the project pertains  |
| <b>7.</b> Select the site which will be working on this project                                  | <b>8.</b> Grid list of all the existing projects in system. Click the SELECT button to view and/or edit the details of a particular project |
| <b>9.</b> Actions buttons to SAVE, Update, CLEAR (REFRESH), REPORT VIEW, and DOCUMENT ATTACHMENT |   |

## PROJECT TRACKING

22

UPDATE
DELETE
FIND
CLEAR
REPORT
DOCUMENTS

Invoiced: 10,000 (22.5%)  
 Received: 9,000 (20.25%)  
 Balance: 35,444 (79.75%)

21

| Transaction No.*:                   | PT-00000001 <span style="font-size: 24px; font-weight: bold;">1</span> | Transaction Date*: | 11/28/2018 <span style="font-size: 24px; font-weight: bold;">2</span>  | Partner:  | Qaiser Jameel <span style="font-size: 24px; font-weight: bold;">16</span>      |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
|-------------------------------------|--|--------------------|--|---|--|--------|--------------|-------------------------------------|-------------|--------------------------|--|-------------------------------------|--------------|-------------------------------------|---------------------|
| Project*:                           | PROJECT 01 <span style="font-size: 24px; font-weight: bold;">3</span>  | Customer*:         | FARRUKH <span style="font-size: 24px; font-weight: bold;">4</span>   | Team Lead:  | Shahid Rasool Khan <span style="font-size: 24px; font-weight: bold;">17</span> |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| Client Person*:                     | Mujtaba <span style="font-size: 24px; font-weight: bold;">5</span>     | Designation*:      | MANAGER <span style="font-size: 24px; font-weight: bold;">6</span>   | <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Select</th> <th style="width: 95%;">Team Members</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Jawad Ahmed</td> </tr> <tr> <td><input type="checkbox"/></td> <td>M. Fahad <span style="font-size: 24px; font-weight: bold;">18</span></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Nayyer Ilyas</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Wasim Saleem Saigal</td> </tr> </tbody> </table> |  | Select | Team Members | <input checked="" type="checkbox"/> | Jawad Ahmed | <input type="checkbox"/> | M. Fahad <span style="font-size: 24px; font-weight: bold;">18</span> | <input checked="" type="checkbox"/> | Nayyer Ilyas | <input checked="" type="checkbox"/> | Wasim Saleem Saigal |
| Select                              | Team Members   |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| <input checked="" type="checkbox"/> | Jawad Ahmed  |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| <input type="checkbox"/>            | M. Fahad <span style="font-size: 24px; font-weight: bold;">18</span>   |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| <input checked="" type="checkbox"/> | Nayyer Ilyas   |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| <input checked="" type="checkbox"/> | Wasim Saleem Saigal  |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| Contact No.:                        | 3423433 <span style="font-size: 24px; font-weight: bold;">7</span>     | Project Status:    | IN PROGRESS <span style="font-size: 24px; font-weight: bold;">8</span>   |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| Inception Date*:                    | 11/01/2018 <span style="font-size: 24px; font-weight: bold;">9</span>  | Completion Date*:  | 11/30/2018 <span style="font-size: 24px; font-weight: bold;">10</span> <span style="border: 1px solid black; padding: 2px;">MILESTONE</span> |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| Duration*:                          | 5 <span style="font-size: 24px; font-weight: bold;">12</span> Weeks    | Value:             | 44444 <span style="font-size: 24px; font-weight: bold;">13</span> <span style="font-size: 24px; font-weight: bold;">PKR14</span>             |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |
| Project Description:                | None <span style="font-size: 24px; font-weight: bold;">15</span>       |                    |  |   |  |        |              |                                     |             |                          |  |                                     |              |                                     |                     |

| Date   | Team Lead Comments  | Name             | ADD NEW ROW |
|--|---------------------|------------------|-------------|
| 11/28/2018 <span style="font-size: 24px; font-weight: bold;">19</span> | Team Lead Comment 1 | Shahid Rasool Kh |             |
| 11/29/2018   | Team Lead Comment 2 | Shahid Rasool Kh |             |

| Date   | Partner Comments   | Name          | ADD NEW ROW |
|--|--------------------|---------------|-------------|
| 11/28/2018 <span style="font-size: 24px; font-weight: bold;">20</span> | Partner Comments 1 | Administrator |             |
| 11/29/2018   | Partner Comments 2 | Administrator |             |

|  |  |
|--|--|
| <b>1.</b> Auto-generated Number (Entry Reference No.)  | <b>2.</b> Date of Transaction  |
| <b>3.</b> Select the Project from the projects list  | <b>4.</b> Customer name will be fetched automatically up on selection of the project   |
| <b>5.</b> Enter the name of client's representative for correspondence                                   | <b>6.</b> Select the designation of client representative  |
| <b>7.</b> Enter the contact number of client representative  | <b>8.</b> Select the Status of the project (In Progress, In Pipe-line, With Held, Completed)   |
| <b>9.</b> Enter the inception date of the project  | <b>10.</b> Enter the estimated or actual closing date of the project   |
| <b>11.</b> Click the "Milestone" Button to enter the payment milestones decided for project fee payment. | <b>12.</b> Duration of the project (In Number of Weeks) will appear automatically up on selection of Project Starting and Ending dates |
| <b>13.</b> Enter the Total Cost of the project   | <b>14.</b> Select the currency In which the project cost is agreed   |
| <b>15.</b> General Description, Narration about the project  | <b>16.</b> Select the Partner Name responsible for project activities  |
| <b>17.</b> Select the Employee who will be the team leader of this project                               | <b>18.</b> Select all the Employees who are involved in this project   |
| <b>19.</b> This grid will be available for the project team leader to enter his comments. Every comment  | <b>20.</b> This grid will be available for the Partner to enter his comments. Every comment will                                       |

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|   |  |
|---|--|
| will appear sorted date wise so that the Partner can view it and post his comments on it. To add a new comment use the ADD NEW ROW button. Only the team leader would get access to this grid while other uses can only view the comments | appear sorted date wise so that the project team leader can view it. To add a new comment use the ADD NEW ROW button. Only the Partner would get access to this grid while other uses can only view the comments |
| <b>21.</b> A summary of Project Cost, the total receipt against the invoiced amount, and balance receivables against this project   | <b>22.</b> Actions buttons to SAVE, Update, FIND, CLEAR (REFRESH), DELETE, REPORT VIEW, and DOCUMENT ATTACHMENT  |

**PROJECT MILESTONE WINDOW**

Transaction No.  1 Transaction Value  2

| Date       | Milestone Type   | Remarks                            | Percent | Amount  | Received |
|------------|------------------|------------------------------------|---------|---------|----------|
| 12/01/2018 | PHASE 01         | Mobilization Advance               | 10      | 4444.4  | 0        |
| 12/26/2018 | PHASE 02         | Delivery of Report                 | 90      | 39999.6 | 0        |
|            | SELECT MILESTONE | <span style="color: red;">3</span> |         |         |          |
|            | SELECT MILESTONE |                                    |         |         |          |
|            | SELECT MILESTONE |                                    |         |         |          |

|   |   |
|---|---|
| <b>1.</b> Reference number of the project to which the payment milestone pertains   | <b>2.</b> Total project cost (automatically appearing from the project tracking window) |
| <b>3.</b> Enter the dates, Milestone type, Remarks, and percentage of payment to be made upon achieving that milestone and it will show the Amount due automatically. Received amount will appear once the payment will be done against that particular milestone | <b>4.</b> Save the milestones before exiting the form                                   |